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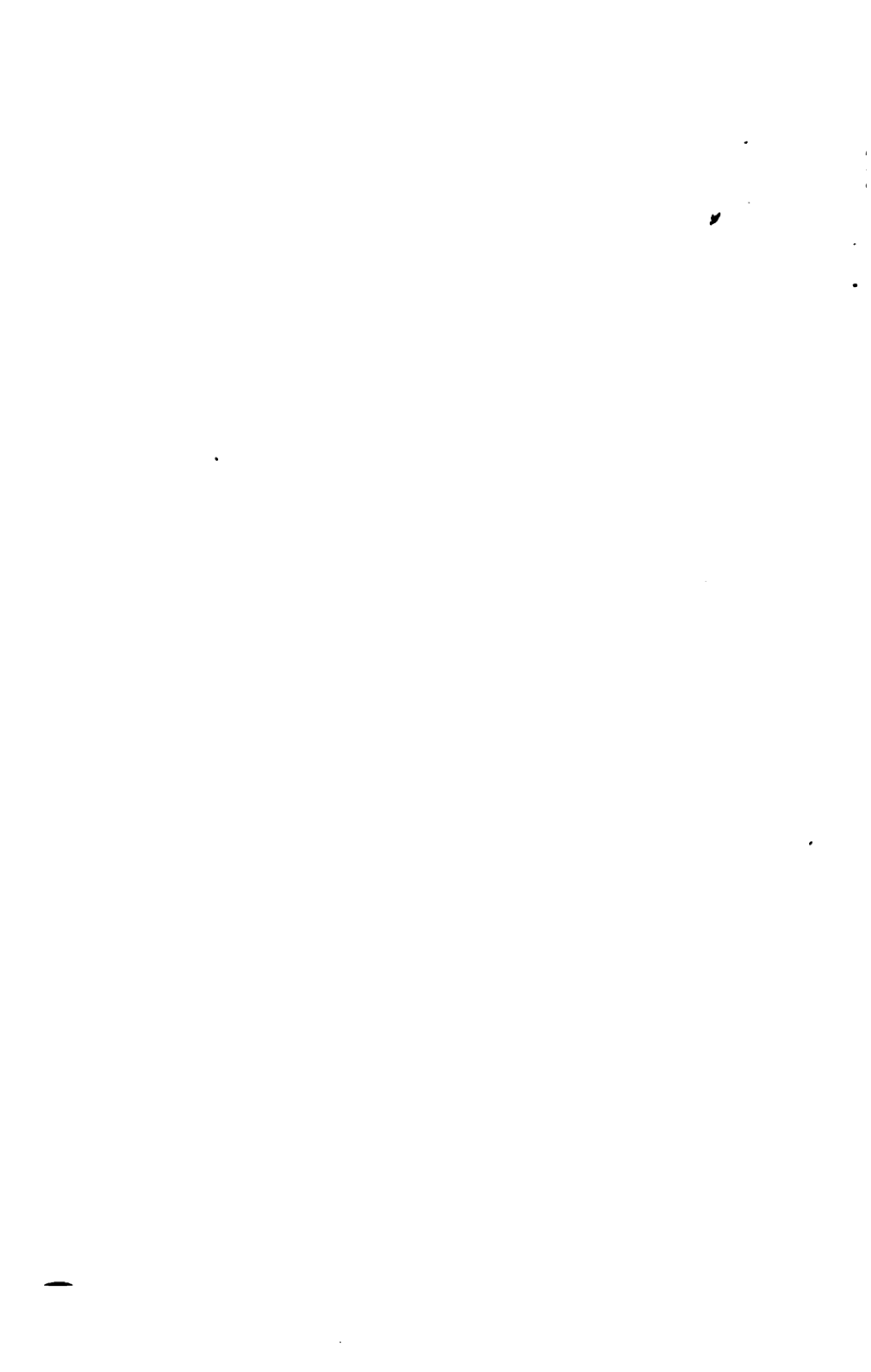


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A  
CONCISE TREATISE  
ON THE  
LAW OF WILLS.

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A

CONCISE TREATISE  
ON THE  
LAW OF WILLS.

BY

H. S. THEOBALD,

OF THE INNER TEMPLE, ESQUIRE, BARRISTER-AT-LAW, AND  
FELLOW OF WADHAM COLLEGE, OXFORD.

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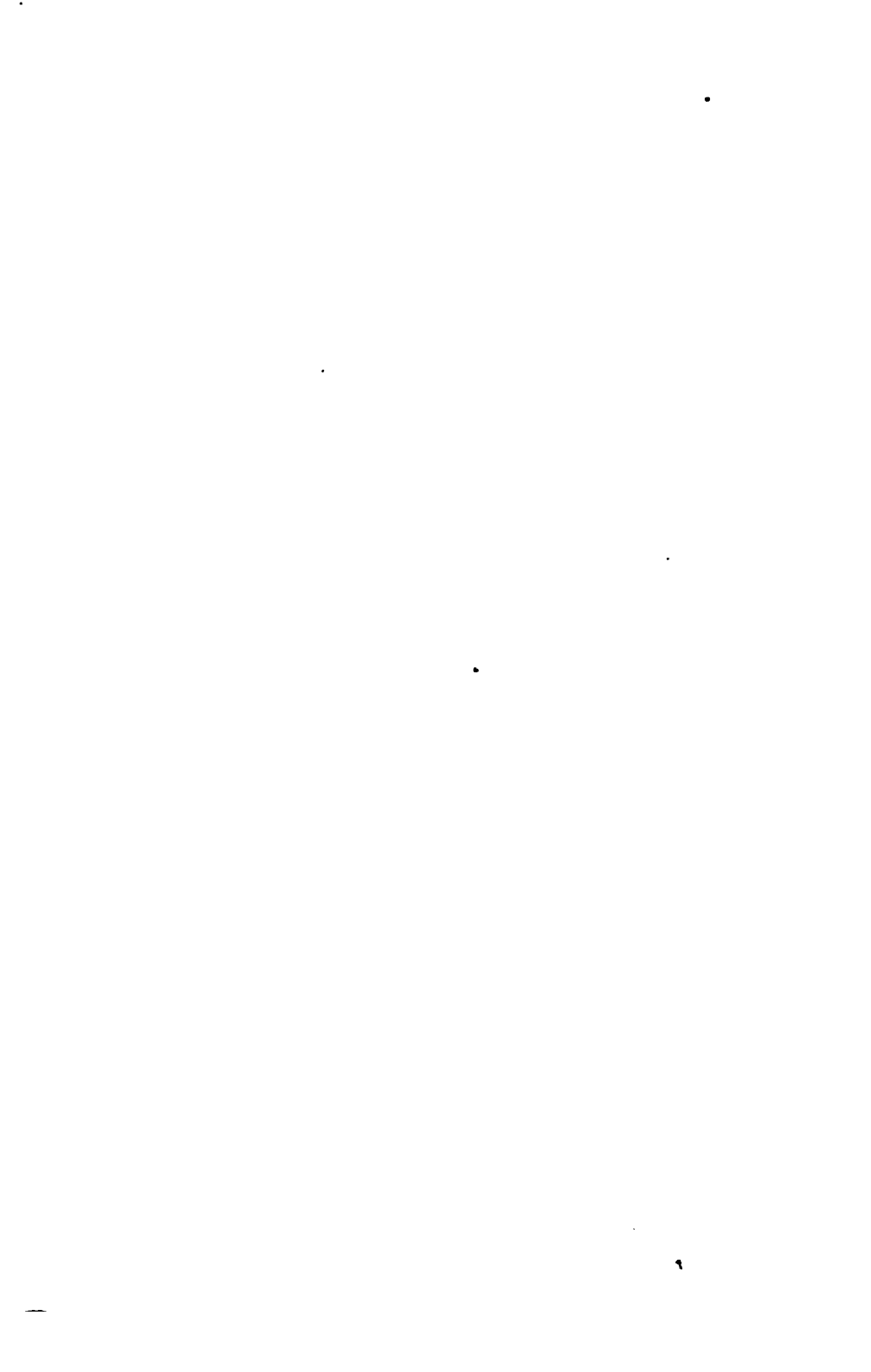


## PREFACE TO THE SECOND EDITION.

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I HAVE endeavoured in this edition to make the work more complete by adding chapters on the execution of wills and other cognate subjects. A short chapter has also been added on the powers which it is usual to confer upon the trustees of wills. I have done my best to correct the mistakes and supply the omissions of the first edition. With the exception of some small matters of detail, the arrangement remains unaltered. The cases will be found brought down to May, 1881. References to some cases which were reported too late to be inserted in the text have been added in the Index. My best thanks are due to my friend Mr. J. F. H. Bethell of Lincoln's Inn for many useful suggestions.

33, CHANCERY LANE,  
*July, 1881.*



## PREFACE TO THE FIRST EDITION.

---

THE fact that the last comprehensive treatise on the Construction of Wills is now fifteen years old, might alone be a sufficient justification of a new work on the subject. Whether it is a sufficient justification of the work now offered to the profession, experience alone can show. My object has been to produce something more compendious than Jarman's classical work—the scheme of which, involving the statement of cases at length, would now be very cumbersome, in consequence of the large accumulation of cases since the last edition of his work ; and on the other hand, something more detailed and elaborate than Mr. Vaughan Hawkins' useful little book. I may say at once that without Jarman's book, my own would probably never have been written. But I have throughout used his work rather as a guide than a key to the authorities. In details I have consulted Mr. Vaughan Hawkins only incidentally, though the general scheme of his book has served in the main as the model for my own.

The value of authority in questions of testamentary construction has so frequently been called in question

of late, that it may perhaps be allowable to say a few words as to the point of view from which the present work has been written.

No two wills are alike, it is said ; it is therefore useless to cite a decision upon one will as governing the interpretation of another ; one man's " nonsense " affords no clue to the meaning of another man's " nonsense."

Such expressions as these are very natural, and as a protest against hard and fast rules of construction, very valuable. The stream of English law is so continuous, and the mass of reported decisions so enormous, that very few points arise in practice upon which it is not possible to cite some more or less appropriate authority. Counsel, in their anxiety to omit nothing which may support their client's interests, overlay their argument with cases, the majority of which have no more than a superficial resemblance to the point in question. It is no wonder that judges, wearied with the citation of irrelevant cases, have sometimes gone so far as to object to the citation of cases upon the construction of wills altogether. And often the argument from authority is carried further. It is contended that there is some hard and fast rule which is to be applied regardless of the words of the will and the intention of the testator. The assumption of rules of construction in this sense is an almost unmixed evil. It tends to divorce law from common sense, and to reduce it to a set of technicalities which none but the initiated can understand. Unfortunately this point of view has not been without its influence upon English law. The



most striking instance of it is perhaps the doctrine of general and particular intention. As now interpreted in the sense that technical words must have their legal effect, this doctrine would be identical with the modern doctrine that a testator must mean what he has said, were it not for the survival of the older doctrine in the so-called rule in Shelley's case. In this application of it, the rule is not simply that technical words must have their legal effect, but that technical words must have their effect notwithstanding the strongest and clearest expression of intention on the part of the testator short of an express interpretation clause, that the words were not used technically. That a devise to a man for life with remainder to his heirs should give the ancestor the immediate fee, must always remain incomprehensible to common sense, however satisfactorily the learned may be able to trace the origin of the rule in a state of things long gone by. The rule in Shelley's case is in fact a disgrace to the rational spirit of English law, and it is to be hoped that it may soon be abolished by the Legislature, as it has long since been in America.

Another and more recent instance of an attempt to establish hard and fast rules of construction may be found in the rules laid down in *Edwards v. Edwards*. In all probability Lord Romilly only intended those rules to be convenient heads for arranging decided cases, and so far as they accurately extracted the *ratio decidendi* of those cases, they were very valuable. But, in course of time, they came to have a value independently of the cases upon which they were based,

and there can be no doubt that the so-called fourth rule which was laid down in terms more general than decided cases justified, came to be applied to new cases *ab extra* without much consideration of the language of the particular testator. The consequence was the sacrifice of the wishes of the individual to the certainty of the law ; and had not a decision of the House of Lords intervened to reduce the rule within its proper limits, there would have been another instance of language meaning one thing to a layman and a totally different thing to a lawyer.

So far then it may be said there are no rules of construction but only decided cases. A testator can only mean what he has said, and his meaning is to be gathered by a careful study of the language he has used. On the other hand, admitting all this, it does not therefore follow that the construction of a will is to be left entirely to the discretion of the individual judge, unfettered by precedent or authority, though occasional dicta of judges might be cited in support of such a position.

The principles of law applicable to the construction of wills must be the same as those applicable to other matters.

Law is no more than the expression of the meaning of the acts of men in their relations with one another, when viewed by the most enlightened common sense of the day. There is no abstract law to be applied like a foot rule to facts ; but law is the facts viewed in their natural bearings with reference to each other. It follows that, if the facts are the same, the same consequences ought to

be deduced from them. The difficulty consists in discovering whether the facts are the same or not. In one sense, no doubt, the facts never are absolutely identical. There must at least be a difference of time, and this in itself, considering the continuous change in social life, is an important factor. But the question is not whether the facts are absolutely identical, but whether a fresh set of facts can be fairly distinguished from an earlier set. If not, judges have always considered themselves bound by the interpretation put upon such facts by their predecessors ; and when there have been repeated adjudications upon similar sets of facts, by a process of analysis and classification, rejecting immaterial distinctions and selecting essential points of similarity, what may be called a rule of law is established. But rules of law in this sense as distinguished from rules of policy, or from rules of law established by legislative enactment, only mean that the Courts have taken a particular view of a certain set of facts, and will do so again if similar facts arise. This process is inevitably subject to a twofold danger ; a strong judge will be more likely to distinguish cases, he will look upon precedent as a guide and not as a master. A judge of a less independent spirit will dwell more upon resemblances, he will be more anxious to shelter himself under authority. The inclination of the one to adapt the law to the changing conditions of life has the accompanying disadvantage of unsettling it, while the other tends to make the law antiquated, though he leaves it certain.

No doubt in the case of wills there is this dis-

tion. The facts here are the words employed by the testator, and since language is a much more adequate instrument for conveying subtleties of meaning than any other form of expression, the facts are of necessity exceedingly complex. It is more unlikely that undistinguishable sets of facts have already been adjudicated upon in the case of wills than in any other branch of law ; but if they have been the subject of decision, a Court of co-ordinate jurisdiction is as much bound by those decisions in the cases of wills as in any other branch of law. The frequent dicta, therefore, to be found in the reports against citing cases upon the construction of wills only come to this, that it is useless to cite cases which have no application, and that in all probability the cases cited will be found to have none. Even with regard to this latter point it will not be safe to be too confident. Cases of construction are so numerous, originality even in "nonsense" is so rare, that there will nearly always be similar cases, or, at any rate, cases instructive even by their distinguishability.

The present work has been written from the point of view which I have thus endeavoured to indicate. Wherever rules of construction are spoken of in the following pages, the meaning is, that certain words have received a particular interpretation by the Courts, and that words not reasonably distinguishable will receive the same interpretation when they occur again, or, in other words, that certain rules of construction will prevail in the absence of an intention to the contrary. The rules of construction here discussed are,

in fact, no more than a collection of arguments for or against the different constructions which may suggest themselves in the interpretation of the meaning of testators.

*November, 1876.*



# CONTENTS.

---

TABLE OF CASES . . . . .	PAGE xix
CHAPTER I.	
BY WHAT LOCAL LAW WILLS ARE REGULATED . . . . .	1—8
CHAPTER II.	
GENERAL CHARACTERISTICS OF TESTAMENTARY INSTRUMENTS . . . . .	9—13
CHAPTER III.	
TESTAMENTARY CAPACITY . . . . .	14—19
CHAPTER IV.	
REQUISITES FOR A VALID WILL . . . . .	20—31
CHAPTER V.	
ALTERATIONS, INTERLINEATIONS, AND ERASURES . . . . .	32—34
CHAPTER VI.	
REVOCATION . . . . .	35—47
CHAPTER VII.	
WILLS OF SOLDIERS AND SEAMEN . . . . .	48—57
CHAPTER VIII.	
REVIVAL OF WILLS—INCORPORATION . . . . .	58—65
CHAPTER IX.	
PROBATE AND ITS EFFECT . . . . .	66—69

## CHAPTER X.

WHAT PROPERTY MAY BE DISPOSED OF BY WILL . . . . .	PAGE 70—75
--	---------------

## CHAPTER XI.

EXECUTORS AND GUARDIANS . . . . .	76—80
-----------------------------------	-------

## CHAPTER XII.

ELECTION . . . . .	81—91
--------------------	-------

## CHAPTER XIII.

WHO MAY BE DEVISEES OR LEGATEES . . . . .	92—94
---	-------

## CHAPTER XIV.

DESCRIPTION.—WHAT PASSES UNDER A SPECIFIC DESCRIPTION . . . . .	95—103
---	--------

## CHAPTER XV.

SPECIFIC, GENERAL AND DEMONSTRATIVE LEGACIES . . . . .	104—113
--	---------

## CHAPTER XVI.

CUMULATIVE AND SUBSTITUTIONAL LEGACIES . . . . .	114—118
--	---------

## CHAPTER XVII.

THE INCIDENTS ATTACHING TO SPECIFIC AND GENERAL LEGACIES . . . . .	119—143
--	---------

## CHAPTER XVIII.

AS TO THE MEANING OF CERTAIN WORDS . . . . .	144—160
--	---------

## CHAPTER XIX.

THE EFFECT OF A DEVISE IN GENERAL WORDS . . . . .	161—181
---	---------

## CHAPTER XX.

RESIDUARY BEQUESTS . . . . .	182—191
------------------------------	---------

## CHAPTER XXI.

CONVERSION . . . . .	192—206
----------------------	---------

## CHAPTER XXII.

GIFTS TO PERSONS DESIGNATE AND TO PERSONS FILLING A CERTAIN CHARACTER . . . . .	207—225
--	---------



# CONTENTS.

xvii

## CHAPTER XXIII.

	PAGE
CONSTRUCTION OF GIFTS TO CHILDREN . . . . .	226—256

## CHAPTER XXIV.

MEANING OF WORDS DESCRIPTIVE OF RELATIONSHIP . . . . .	257—268
--	---------

## CHAPTER XXV.

GIFTS TO HEIRS, NEXT OF KIN, REPRESENTATIVES, AND EXECUTORS . . . . .	269—289
---	---------

## CHAPTER XXVI.

GIFTS TO CHARITABLE USES . . . . .	290—313
------------------------------------	---------

## CHAPTER XXVII.

SUCCESSIVE AND CONCURRENT INTERESTS, JOINT TENANCY AND TENANCY IN COMMON . . . . .	314—322
---	---------

## CHAPTER XXVIII.

ESTATES IN FREE AND IN TAIL . . . . .	323—345
---------------------------------------	---------

## CHAPTER XXIX.

ESTATES OF TRUSTEES . . . . .	346—353
-------------------------------	---------

## CHAPTER XXX.

ON CERTAIN POWERS COMMONLY INSERTED IN WILLS . . . . .	354—369
--	---------

## CHAPTER XXXI.

ABSOLUTE INTERESTS IN PERSONALTY . . . . .	370—386
--	---------

## CHAPTER XXXII.

GIFTS OF ANNUITIES . . . . .	387—397
------------------------------	---------

## CHAPTER XXXIII.

CONDITIONS PRECEDENT—VESTING . . . . .	398—423
--	---------

## CHAPTER XXXIV.

PERPETUITY AND ACCUMULATION . . . . .	424—449
---------------------------------------	---------

## CHAPTER XXXV.

CONDITIONS SUBSEQUENT . . . . .	450—471
---------------------------------	---------

## CHAPTER XXXVI.

LIMITATIONS BY WAY OF REMAINDER—DIVESTING . . . . .	472—490
---	---------

## CHAPTER XXXVII.

SUBSTITUTION . . . . .	491—501
------------------------	---------

## CHAPTER XXXVIII.

	PAGE
GIFTS TO SURVIVORS . . . . .	502—518

## CHAPTER XXXIX.

THE CONSTRUCTION OF GIFTS OVER . . . . .	519—533
--	---------

## CHAPTER XL.

GIFTS OVER UPON DEATH WITHOUT ISSUE . . . . .	534—547
---	---------

## CHAPTER XLI.

SHIFTING CLAUSES . . . . .	548—551
----------------------------	---------

## CHAPTER XLII.

GIFTS BY REFERENCE . . . . .	552—555
------------------------------	---------

## CHAPTER XLIII.

EXECUTORY TRUSTS . . . . .	556—562
----------------------------	---------

## CHAPTER XLIV.

IMPLICATION . . . . .	563—574
-----------------------	---------

## CHAPTER XLV.

REVOCATION . . . . .	575—580
----------------------	---------

## CHAPTER XLVI.

ALTERING WORDS—UNCERTAINTY . . . . .	581—585
--------------------------------------	---------

## CHAPTER XLVII.

SATISFACTION AND ADEMPION . . . . .	586—600
-------------------------------------	---------

## CHAPTER XLVIII.

INTERESTS UNDISPOSED OF . . . . .	601—617
-----------------------------------	---------

## CHAPTER XLIX.

ADMINISTRATION . . . . .	618—649
--------------------------	---------

## CHAPTER L.

SUGGESTIONS FOR PREPARING WILLS . . . . .	650—652
---	---------

## APPENDIX.

THE WILLS ACT . . . . .	653—660
STAMP DUTIES (PROBATES, LEGACIES AND SUCCESSIONS) . . . . .	661, 662
INDEX . . . . .	663—END.

## TABLE OF CASES.

---

- AARON v. Aaron**, 60, 63  
**Abadam v. Abadam**, 148  
**Abbey, Hancox v.**, 127, 639, 642, 643  
**Abbiss v. Burney**, 480, 549  
**Abbot, Cary v.**, 293  
     — *v. Massie*, 208  
**Abbott, Bridge v.**, 284  
     — *Clarke v.*, 167  
     — *v. Fraser*, 297  
     — *Hopkins v.*, 148  
     — *Kennell v.*, 197, 215  
     — *v. Middleton*, 583  
     — *v. Peters*, 53  
**Abell, Chaffers v.**, 410  
     — *Marriott v.*, 479, 513  
**Abercorn, Marq. of, Bedford, Duke of, v.**, 561  
**Abey, Doe d. Borwell v.**, 395  
**Abingdon, Prowse v.**, 407, 628  
     — *Stevenson, v.* (31 B. 305), 258, 260  
     — *Stevenson v.* (11 W.R. 935), 452  
**Abinger, Ltd., Scarlett v.**, 458  
**Abney v. Miller**, 122  
**Abraham, Bethel v.** (22 W.R. 745), 588  
     — *Bethell v.* (17 Eq. 24), 360  
     — *v. Joseph*, 45  
**Abrams v. Winshup**, 326  
**Abrey v. Newman**, 255  
**Acey v. Simpson**, 621  
**Acherley v. Vernon**, 400  
**Acheson v. Fair**, 376, 569  
**Ackers, Phipps v.**, 136, 403, 404  
**Ackland v. Lutley**, 352  
     — *Shelford v.*, 172, 178  
**Ackroyd v. Ackroyd**, 648  
     — *v. Smithson*, 197  
**Ackworth v. Ackworth**, 588  
**Acton v. Acton**, 106  
     — *Garnett v.*, 204  
     — *M'Neillie v.*, 366  
     — *v. White*, 471  
**Acworth, Coutts v.**, 82  
**Adair, Maitland v.**, 602  
**Adam, Wilkinson v.**, 55, 226, 231, 233, 240  
**Adams, In bonis**, 83  
**Adams' Trusts**, 473, 484  
     — *v. Adams* (25 B. 642), 222  
     — *v. Adams* (6 Q. B. 860), 350  
     — *v. Adams* (14 Eq. 246), 497  
     — *v. Adams* (1 Ha. 537), 574  
     — *v. Beck*, 224  
     — *v. Bush*, 223  
     — *v. Ferrick*, 125  
     — *Haddelsey v.*, 350, 502  
     — *Hereford, Bishop of, v.*, 294  
     — *v. Jones*, 214  
     — *Jordan v.*, 272, 339, 341  
     — *Lavender v.* (1 Add. 403), 33  
     — *v. Lavender* (M'Cl. & Y. 41), 593  
     — *v. Roberts*, 221  
     — *v. Taunton*, 355  
     — *Wheeler v.*, 282  
**Adamson, In bonis**, 32, 77  
     — *v. Armitage*, 469  
**Addecott v. Addecott**, 637  
**Addenbrook, Murray v.**, 534, 544  
**Adderley, Gillaume v.**, 107, 109  
**Addis v. Clement**, 165  
**Addison v. Busk**, 568  
     — *Ewens v.*, 457  
     — *Robinson v.*, 105, 106  
**Adkins, Smith v.**, 74  
**Adnam v. Cole**, 114, 291, 298  
**Adney v. Greatrex**, 257  
**Adolph v. Dolman**, 629  
**Adolphus, Gordon v.**, 399, 406  
**Adshead v. Willetts**, 331, 478  
**Adv.-G., Brown v.**, 9  
**Affleck v. James**, 158  
**Agar, Tenny v.**, 324  
**Agar-Ellis, In re**, 80  
     — *v. Lascelles*, 80  
**Aglionby, Lance v.**, 641  
**Agnew v. Pope**, 577  
     — *Schenck v.*, 484

- Ainalie v. Harcourt, 635  
 Ainsworth, *In bonis*, 25  
 Aird's Estate, *In re*; Aird v. Quick, 597  
 Airey, Ellison v., 222  
 Aialabie v. Rice, 451  
 Aistrop, Doe d. Aistrop v., 330  
 Aitcheson v. Dixon, 7  
 Aitken, Whitman v., 526  
 Aked, Milnes v., 255  
 Albemarle, Earl of, v. Rogers, 155  
 Albergy, Scott v., 159  
 Alchin's Trusts, *Re*, 297  
 Alcock v. Sloper, 203  
 — v. Sparhawk, 633  
 Aldam, Busk v., 181  
 Alder v. Lawless, 393  
 Aldridge, Doe d. Phillips v., 296  
 — v. Wallscourt, *Ld.*, 642  
 Alexander, *In bonis*, 1  
 — v. Alexander (5 B. 518), 118  
 — v. Alexander (16 C. B. 59), 219, 401, 403  
 — v. Brame, 304, 305  
 — v. Douglas, 268  
 — v. Dover r., 227, 235  
 — Gillespie v., 116  
 — Hubbard v., 116  
 — Jeffries v., 305  
 — v. Mills, 357  
 Alford, Attwood v., 396, 495, 500  
 Alger v. Parrott, 283, 370  
 Alington, Booth r., 109, 320  
 Allan v. Gott, 640  
 — Hollis v., 644  
 Allardice v. Onslow, 7  
 Allcroft, Dent v., 307, 309  
 Allen, *In bonis*, 26  
 Allen's Estate, 486  
 Allen v. Allen, 72, 181, 182  
 — v. Anderson, 90  
 — v. Backhouse, 635  
 — v. Callow, 115, 116  
 — Doe v., 325  
 — Doe d. Allen v., 210  
 — Farthing v., 486  
 — Festing v. (5 Ha. 576), 139, 140, 141  
 — Festing v. (12 M. & W. 279), 404  
 — Hawkins v., 307  
 — Hearn v., 155  
 — v. Jackson, 399, 454  
 — James v., 291, 298  
 — v. Kelly, 105  
 — v. Maddock, 62  
 — v. Manning, 54  
 — M'Cutcheon v., 567  
 — v. M'Pherson, 69  
 — Phillips v., 325  
 Allen v. Poulton, 164  
 — v. Webster, 233  
 Allenby, Lewis v., 307  
 Allgood v. Blake, 259, 272, 314  
 — v. Withers, 330  
 Allhusen v. Whittell, 646, 647  
 Allin v. Crawshaw, 566  
 Alloway v. Alloway, 320  
 Allsop, Holland v., 504  
 All Souls' Coll. v. Codrington, 101  
 Allum v. Fryer, 360  
 Almack v. Horn, 240  
 Alpess v. Watkins, 330  
 Alsop v. Bell, 625  
 Alt v. Gregory, 255, 394  
 Alty v. Moss, 511  
 Ambler, Pettinger v., 179  
 Ames v. Cadogan, 174  
 Ames, Prichard v., 467  
 Amherst's Trusts, *In re*, 463  
 Amies' Estate, *In re*; Milner v. Milner, 468  
 Amiss, *In bonis*, 23, 26, 30  
 Amphlett v. Parke, 195  
 Amson v. Harris, 252  
 Amyott, Jacobs v., 372  
 Ancaster, Duke of, v. Meyer, 126  
 Ancona v. Waddell, 465  
 Anderson, *In bonis*, 59  
 — Allen v., 90  
 — v. Anderson (13 Eq. 381), 94  
 — v. Anderson (30 Beav. 209), 339  
 — v. Anderson (33 B. 223), 623, 636  
 — v. Dwyer, 142  
 — Ewing v., 457  
 — Gordon v., 115  
 — v. Laneuville, 7  
 — Price v., 644  
 — Rudstone v., 123  
 — Wallace v., 463  
 Andover, Lord, Heneage v., 635  
 Andree v. Ward, 540  
 Andrew, *Re*, 418  
 — v. Andrew (1 Ch. D. 410), 333, 403, 564, 610  
 — v. Andrew (1 Coll. 690), 472, 473  
 — Att.-Gen. v., 311  
 — Drennan v., 480  
 — Fulton v., 20  
 — v. Motley, 44  
 — v. Trinity Hall, 82  
 Andrewes v. George, 599  
 Andrews, *In re*, 79  
 — *Ex parte*; Fells, *In re*, 367  
 Andrews' Trusts, *Re*, 423  
 — Will, *Re*, 373  
 Andrews v. Andrews, 382

- Andrews, Douglas v., 517, 518  
   — v. Lord, 488, 490  
   — v. Partington, 244  
   — v. Salt, 80  
   — Woollen v., 442  
 Androvin v. Poilblanc, 614  
 Angel, Davis v., 455  
 Angell, Brewster v., 561  
 Angermann v. Ford, 287  
 Angrave, Wing v., 480  
 Annesley, Tooker v., 645  
 Ann Fry's Case, Lady, 399, 406  
 Annis, Burke v., 327  
 Anstee, Eames v., 554  
   — v. Nelms, 95  
 Anstey, Stroushill v., 354, 361  
 Anstice, *Re*, 487, 489  
 Anstruther v. Chalmer, 3  
   — Ouseley v., 639, 642  
 Antrobus, Johnson v., 485  
   — v. Nepean, 55  
 Apjohn, Clune v., 600  
 Aplin's Trust, 91  
 Applebee, *In bonis*, 37  
 Appleford, Easum v., 180, 187  
 Appleton v. Rowley, 370, 466  
 Applin, Doe d. Blandford v., 343  
 Apsey v. Apsey, 486  
 Apthorp, Walpole v., 112, 113  
 Arboutin, Pritchard v., 307  
 Archbold v. Austin Gourlay, 405  
 Archer, *In bonis*, 25  
 Archer's Case, 342  
 Archer v. Jegon, 422  
   — v. Lavender, 466  
   — v. Legg, 253  
   — v. Rorke, 467  
 Archibald v. Wright, 74, 376  
 Ardagh, Makeown v., 121, 296, 297  
 Arden v. Goodacre, 462  
 Ariel, Tidwell v., 604  
 Arkell v. Fletcher, 165  
 Arkle, Williams v., 288, 614  
 Armitage, Adamson v., 469  
   — Calvert v., 628  
   — v. Coates, 430  
   — v. Williams, 247, 248, 252  
 Armistead, Eidsforth v., 361  
 Armstrong, *In re*, 148  
   — v. Armstrong (12 Eq. 614), 123  
   — v. Armstrong (18 Eq. 541), 363  
   — v. Armstrong (7 Eq. 518), 317, 321, 385  
   — v. Buckland, 99  
   — v. Burnet, 125  
   — v. Clavering, 215  
   — v. Eldridge, 394  
   — v. Lynn, 600  
 Armstrong, Monsell v., 356  
   — Quin v., 176  
   — Robertson v., 364  
   — Tullett v., 470  
   — Walker v., 45  
 Arnitt, Naylor v., 365  
 Arnold, *Ex parte*; Battersea Park Acts, *Re*, 205  
 Arnold's Trusts, *In re*, 505  
   — Estate, *Re*, 326, 519, 536, 574  
 Arnold v. Arnold, 184, 623  
   — v. Att.-Gen., 300  
   — v. Chapman, 608  
   — Claridge v., 327  
   — v. Dixon, 206  
   — v. Enis, 647  
   — Johnson v., 192  
 Arrow v. Mallish, 254  
 Arrowsmith's Trusts (29 L. J. Ch. 775; 6 Jur. N. S. 1231), 525, 579  
   — Trust (27 L. J. Ch. 704; 4 Jur. N. S. 1123), 149, 168  
 Arthur, *In bonis*, 25, 28  
   — v. Hughes, 484  
   — v. Mackinnon, 101  
 Arundel's Case, Earl of, 453  
 Arundel, Watson v. (L. R. 10 Eq. 299), 186  
 Arundell, Watson v. (L. R. 11 Eq. 53), 195  
 Asgill, Legge v., 145, 188  
 Ash v. Ash, 276  
 Ashbie, Leventhorpe v., 371  
 Ashburner v. M'Guire, 106, 109, 119, 121  
   — v. Wilson, 219  
 Ashburton, Lord, Bainbridge v., 169  
   — Baring v., 644  
 Ashdown, Lord, Cosby v., 85  
 Ashenhurst's Case, 270, 272  
 Asher, Harrison v., 119  
   — v. Whitlock, 72  
 Ashford, Davies v., 110  
   — Sanders v., 538, 607  
 Ashley v. Ashley, 434, 536, 572  
   — Doe d. Remow v., 100  
 Ashling v. Knowles, 495  
 Ashmore, *In bonis*, 28, 30  
 Ashmore's Trusts, *In re*, 414, 415  
 Ashton, *In bonis*, 28  
   — v. Ashton, 105  
   — v. Horsfield, 160  
   — Ion v., 304, 643  
   — v. Langdale, Ltd., 306  
   — Trafford v., 219, 635

- Ashton, Williams *v.* 33, 277  
   — *v.* Wood, 75  
 Ashworth, Fielden *v.*, 264, 277  
   — *v.* Munn, 303  
   — *v.* Simpson, 323  
 Askew, Dingwell *v.*, 16, 120  
   — *v.* Rooth, 148  
   — *v.* Thompson, 139  
 A-key, Birds *v.*, 628  
 Askham, Berry *v.*, 634  
 Aspinall *v.* Duckworth, 287, 604, 606,  
   608  
   — *v.* Petvin, 564, 565  
 Astley, Edward *v.*, 33  
   — *v.* Essex, Earl of (6 Ch. 898),  
   142  
   — *v.* Essex, Earl of (18 Eq. 290),  
   461, 461  
   — Evans d. Brooke *v.*, 536  
   — *v.* Mickelthwait (15 Ch. D. 59),  
   475, 624  
   — *v.* Mickelthwait (15 Ch. D. 59),  
   245  
 Aston, Brandon *v.*, 246  
   — *v.* Gregory, 139  
   — *v.* Wood, 82, 121, 188, 296, 378,  
   383  
 Astor, *In bonis*, 68  
 Atcheson *v.* Atcheson, 218, 322  
 Atherton *v.* Crowther, 284, 286  
   — Harrington, Countess of, *v.*,  
   199, 647  
   — Potts *v.*, 413  
 Athill, *In re*, 133  
 Atkins *v.* Hiccocks, 411  
 Atkinson *v.* Atkinson, 497  
   — Atter *v.*, 21  
   — *v.* Barton, 564, 572  
   — *v.* Bartrum, 492  
   — Bernasconi *v.*, 213  
   — Fulleek *v.*, 53  
   — Gordon *v.*, 819  
   — Grayson *v.*, 24, 160  
   — Henahaw *v.*, 309  
   — *v.* Jones, 191  
   — *v.* Littlewood, 593, 594  
   — *v.* Paice, 568  
   — Pickup *v.*, 202  
   — Reid *v.*, 380  
   — *v.* Webb (2 Vern. 478), 592,  
   593  
   — Wilson *v.*, 279  
 Atkyns, Wright *v.*, 266, 380  
 Atlee *v.* Hook, 18  
 Atree *v.* Atree, 159  
 Atter, *In re*; Wilson *v.* Atter,  
   608  
   — *v.* Atkinson, 21  
 A.-G. *v.* Andrew, 311  
   — Arnold *v.*, 300
- A.-G. *v.* Bacchus, 218  
   — *v.* Baxter, 296  
   — *v.* Bayley, 371  
   — Baylis *v.*, 208  
   — Bevan *v.*, 108  
   — Beverley, Mayor of, *v.*, 300,  
   301  
   — *v.* Blizard, 294  
   — *v.* Boulton, 299  
   — *v.* Bovill, 294  
   — *v.* Bowyer, 297  
   — *v.* Brackenbury, 178  
   — *v.* Brandreth, 294  
   — *v.* Brasenose, 300  
   — of British Honduras *v.* Bris-  
   towe, 199  
   — *v.* Bristol, Mayor of, 300  
   — *v.* Buckland, 295  
   — *v.* Chester, Bishop of, 297  
   — *v.* Coombe, 294  
   — *v.* Cordwainers, 301  
   — *v.* Daly, 135  
   — *v.* Davies, 307, 309  
   — *v.* Delaney, 293  
   — *v.* Dooley, 265, 298  
   — *v.* Drapers, 300  
   — *v.* Dunn, 5  
   — *v.* Exeter, Corporation of,  
   294  
   — Fisk *v.*, 299, 585  
   — *v.* Fitzgerald, 7  
   — *v.* Fletcher, 320  
   — *v.* Gladstone, 296  
   — Glubb *v.*, 309  
   — *v.* Goddard, 306  
   — *v.* Greenhill, 431, 459  
   — *v.* Grote, 107  
   — *v.* Hall, 295, 308  
   — *v.* Hall, Catherine, 431, 459  
   — *v.* Harley, 116, 303, 304  
   — *v.* Hinxman, 310  
   — *v.* Hodgson, 306, 308  
   — *v.* Hotham, Lord, 291  
   — *v.* Hurst, 619  
   — *v.* Hyde, 309  
   — Jauncey *v.*, 138  
   — *v.* Jesus Coll., 300  
   — *v.* Johnstone, 189  
   — *v.* Jones, 9  
   — *v.* Kent, 6, 7  
   — *v.* Lawes, 292  
   — *v.* Lloyd, 578  
   — *v.* Lomas, 199  
   — *v.* Malkin, 370  
   — *v.* Mangles, 192  
   — *v.* Marchant, 300  
   — Marsh *v.*, 297, 303  
   — Mercers' Co. *v.*, 301  
   — *v.* Merchant Taylors, 300, 382,  
   398

TABLE OF CASES.

xxiii

A.-G. v. Mill, 310  
 — v. Milner, 608  
 — v. Munley, 311  
 — v. Napier, 6  
 — v. Northumberland, Duke of, 295  
 — v. Oxford, Bishop of, 297  
 — v. Parnther, 15  
 — v. Parsons, 307  
 — v. Pearson, 292  
 — Pocock v., 299  
 — v. Poulden, 448, 636  
 — v. Poulden, 444  
 — Powell v., 294  
 — v. Price, 294, 295  
 — Reeve v., 299  
 — v. Robins, 622  
 — Rook v., 252  
 — v. Rowe, 6  
 — v. Sands, 612  
 — Society for P. G. v., 301  
 — Southmolton v., 300  
 — v. Sturge, 301  
 — v. Sutton, 538  
 — v. Tancred, 310  
 — Thruxton v., 612  
 — v. Tomkins, 614  
 — v. Trinity Coll., 300  
 — Turner v., 72  
 — v. Vigor, 162, 273  
 — v. Wahlstatt, Countess de, 3  
 — Wallace v., 290  
 — v. Ward, 55, 578  
 — v. Wax Chandlers, 300, 382, 398  
 — v. Webster, 291  
 — v. Whitechurch, 307  
 — v. Whorwood, 311  
 — v. Willinson, 172  
 — v. Williams, 308, 309  
 — v. Wiltshire, 186  
 — v. Winchelsea, Lord, 619  
 — v. Windsor, Dean of, 300  
 — of New South Wales, Platt v., 7  
 Attwater v. Attwater, 97, 402, 459  
 Attwood v. Alford, 396, 495, 500  
 — Toller v., 342, 351  
 Attree v. Hawe, 305, 306  
 Atwell v. Atwell, 194  
 Aubin v. Daly, 388  
 Aubyn, St., Russell v., 589  
 Audley, Gee v., 544  
 — Jee v., 430, 434  
 Audsley v. Horn, 316, 317, 335  
 Auldjo v. Wallace, 554  
 Austen, *In bonis*, 52  
 — Comport v., 408  
 — v. Taylor, 556  
 Auster v. Powell, 598

Austin v. Austin, 468  
 — Eavestaff v., 610  
 — Gourlay, Archbold v., 405  
 — v. Tawney, 457  
 Australia, London Chartered Bank of, v. Lempriere, 624  
 Avelyn v. Ward, 481  
 Avern v. Lloyd, 370, 395, 434  
 Avis, Roe d. James v., 163  
 Avison, Eastwood v., 539  
 — v. Holmes, 464  
 — v. Simpson, 183, 275  
 Awdrey, Milsom v., 505, 517, 554  
 Ayles' Trusts, *In re*, 232  
 Aylesbury, Lady, Popham v., 151  
 Aylesbury's Case, Lady, 151  
 Aylmer, Morrice v., 150  
 Aylwin's Trusts, 246, 464  
 Ayrey v. Hill, 15  
 Ayscough v. Savage, 253  
 Babb, Lamkin v., 53  
 Baber, Johnstone v. (4 W. R. 827; 6 D. M. & G. 439), 154  
 — Johnstone v. (8 B. 233), 355  
 Bacchus, A.-G. v., 218  
 Back v. Kett, 89  
 Backhouse, Allen v., 635  
 Bacon v. Cosby, 532  
 — Macleoth v., 267  
 — Taylor v., 383  
 Baddeley, Porter v., 201  
 Badger v. Gregory, 504  
 Badham v. Mee, 396  
 — Seifferth v., 282  
 Badley, Brooke v., 303, 304, 306  
 — Jones v., 65  
 Badrick v. Stevens, 106  
 Baggett v. Meux, 469, 470  
 Bagley, Loch v., 559  
 — v. Mollard, 226, 233  
 Bagly, Wilson v., 510  
 Bagnall v. Downing, 10  
 Bagot v. Bagot, 645  
 — Brouncker v., 371  
 — v. Legge, 542, 549, 626  
 Bagshaw's Trusts, *In re*, 579  
 Bagshaw, Gill v., 209  
 — v. Spencer, 349, 476  
 Baile v. Coleman 336  
 Bailey, *In bonis*, 18, 24  
 — *In re*, 633  
 — v. Bailey, 633  
 — v. Lloyd, 174  
 — Millard v., 101, 105  
 Baillie, Leighton v., 182

- Baily, *In bonis*, 76  
   — Jennings v., 375  
 Bain v. Lescher, 316, 607  
 Bainbridge v. Ashburton, Lord, 169  
   — v. Bainbridge, 147  
   — Marples v., 454  
   — Parkin v., 33  
 Baine, Willing v., 482  
 Baines, Crigan v., 484  
   — v. Dixon, 634  
   — Doe d. Ashby v., 325, 633  
   — v. Ottey, 285  
 Baker v. Baker, 252, 637  
   — v. Batt, 20  
   — v. Bayldon, 262  
   — v. Bradley, 471  
   — v. Dening, 23  
   — Domville v., 122  
   — Eastman v., 530  
   — v. Farmer, 113, 623  
   — v. Gibson, 281  
   — v. Hall, 608  
   — v. Hanbury, 604  
   — Harwood v., 14  
   — Hearn v., 502, 508  
   — Higham v., 100  
   — James v., 485  
   — Lichfield v., 203  
   — v. Martin, 396  
   — Mason v., 241  
   — v. Moseley, 381  
   — Parsons v., 349, 381  
   — Potter v., 392  
   — Reeves v., 183, 376  
   — Rust v., 495  
   — v. Sebright, 646  
   — Shanley v., 554  
   — v. Story, 40, 577  
   — v. Sutton, 306  
   — Toplis v., 602  
   — v. Tucker, 538  
   — v. Wall, 272, 329  
   — Wharton v., 281  
   — v. White (20 Eq. 166), 347,  
     348, 349  
   — White v. (2 D. F. & J. 55),  
     514  
 Baldwin v. Baldwin, 297, 812  
   — Garth v., 371  
   — Langley v., 538  
   — Miner v., 390, 636  
   — v. Rogers, 436  
 Ball's Trusts, *In re*, 279  
 Ball, Evans v., 194  
   — Forbes v., 175  
   — v. Harria, 361, 631  
 Ballard v. Marsden, 124  
 Balm v. Balm, 247  
 Bamford, Brown v., 471  
   — v. Chadwick, 541  
 Bampffield, Popham v., 399  
 Band v. Green, 612  
 Banister, Doe d. Jearrod v., 323  
 Bankhead, M'Clenaghan v., 546  
 Bankes v. Holme, 431, 547  
   — v. Le Despencer, 560  
 Banks' Trusts, *In re*, 563  
   — Trust, *In re*; Hovill, *Ex parte*,  
     371  
 Banks v. Braithwaite, 143, 392  
   — Dobson v., 190  
   — Floyer v., 433  
   — v. Goodfellow, 14  
   — v. Le Despencer, Baroness,  
     558  
   — v. Scott, 206  
 Bannister, Haley v. (23 B. 336), 118  
   — Haley v. (4 Mad. 275), 444  
 Banon, Riordan v., 64  
 Barber, *In bonis*, 47  
   — *Ex parte*, 148  
   — *Ex parte*; Onslow, *In re*, 367  
   — v. Barber, 142, 607  
   — Cockerell v., 288  
   — Collison v., 525  
   — Gardner v., 396  
   — Simon v., 297  
   — White v., 240  
   — Wilkinson v., 302, 310  
   — v. Wood, 100, 620  
 Barclay v. Maskelyne, 577  
   — v. Wainwright (3 Ves., 462),  
     115, 116  
   — v. Wainwright (14 Ves. 66),  
     644  
 Barden, *In bonis*, 67  
   — v. Meagher, 393  
   — v. Bardon, 513  
 Bardswell v. Bardswell, 379  
 Barford, Doe v., 56  
 Bargeman, Scott v., 573  
 Baring v. Ashburton, 644  
 Barkenshaw v. Hodge, 114  
 Barker's Estate, *In re*; Hetherington  
   v. Longrigg, 191  
 Barker's Trust, 281  
 Barker v. Barker, 458  
   — v. Cocks, 489  
   — v. Devonshire, Duke of, 633  
   — Eaton v., 479  
   — Farrer v., 418  
   — v. Giles, 319  
   — v. Greenwood, 347  
   — v. Lea, 415, 417, 517  
   — Phillips v., 209  
   — Prescott v., 166  
   — Rudge v., 513  
   — Wharton v., 282  
   — v. Young, 530  
 Barksdale v. Gilliat, 143



- Barkshire, Dixon *v.*, 420  
 Barley, Cruse *v.*, 196  
 Barlow, Bowen *v.*, 167  
   — Bradley *v.*, 419  
   — Dixon *v.*, 312  
   — Incorporated Society *v.*, 307, 310  
   — Phillips *v.*, 646  
   — *v.* Salter, 546  
 Barnaby *v.* Tassell, 182, 241, 246, 253, 255, 496  
 Barnacle *v.* Nightingale, 537  
 Barnard, Day *v.*, 279  
   — Titwell *v.*, 647  
   — Stavers *v.*, 239  
 Barnardiston *v.* Carter, 476  
 Barneby, Higginson *v.*, 560, 561  
   — Smith *v.*, 283  
 Barnes *v.* Crowe, 62  
   — Edwards *v.*, 157  
   — *v.* Grant, 381, 382  
   — Howell *v.*, 355, 356  
   — *v.* Jennings, 482, 494  
   — *v.* Patch, 266, 268  
   — *v.* Rowley, 388  
   — Skey *v.*, 573  
 Barnet *v.* Barnet, 409, 565  
 Barnett *v.* Blake, 93  
   — Goodlad *v.*, 102  
   — Patching *v.*, 135, 188, 209, 404, 436, 438, 641  
   — *v.* Tugwell, 231  
   — Van *v.*, 194  
   — Wilday *v.*, 178  
 Barnshaw's Trusts, *In re*, 414  
 Barnwell *v.* Iremonger, 628  
 Baron, Pearce *v.*, 562  
   — Wood *v.*, 333  
 Barraclough *v.* Greenhough, 69  
 Barré, Stocks *v.*, 145  
 Barrett *v.* Beckford, 593  
   — Box *v.*, 83  
   — Gill *v.*, 422  
   — Rickard *v.*, 627  
   — Saltmarsh *v.*, 289, 613  
   — *v.* White, 145  
 Barrington, Galley *v.*, 537  
   — *v.* Liddell, 445, 446  
   — *v.* Tristram, 239  
   — Lord Hood *v.*, 68  
 Barron, Hutchinson *v.*, 98  
 Barrow, Crompe *v.*, 436, 476  
   — Green *v.*, 485  
   — Hawksley *v.*, 15  
   — Herring *v.*, 75  
   — *v.* Wadkin, 93  
 Barrs *v.* Fewkes, 289, 378  
 Barry, Brodie *v.*, 90  
   — *v.* Butlin, 20  
   — Drew *v.*, 388  
 Barry *v.* Harding, 125, 148  
   — Richardson *v.*, 42  
   — Sambourne *v.*, 555  
 Barrymore *v.* Ellis, 471  
 Barstow *v.* Pattison, 460  
 Barter, Seale *v.*, 334  
 Bartholomew, *In re*, 410  
   — *v.* Henley, 10  
 Barthrop, Doe *v.*, 349, 350  
 Bartle, Doe d. Nethercote *v.*, 163  
 Bartlett *v.* Gillard, 593  
   — Rose *v.*, 165  
 Barton's Trusts, *In re* Ezekial, 644  
 Barton, Atkinson *v.*, 564, 572  
   — *v.* Barton, 460  
   — Beckton *v.*, 248, 487  
   — *v.* Briscoe, 470  
   — Buckland *v.*, 171  
   — *v.* Cooke, 386  
   — Denny *v.*, 10  
   — Gath *v.*, 400  
   — *v.* Grant, 386  
   — Horne *v.*, 561  
 Bartrum, Atkinson *v.*, 492  
 Barwick *v.* Mullings, 11, 55  
   — Wells *v.*, 621, 622  
 Basan *v.* Brandon, 119  
 Baskerfield, Burrell *v.*, 192, 422  
 Baskett *v.* Lodge, 555  
 Basset, Hitchins *v.*, 41  
 Basset's Estate, *In re*, 182  
   — Perkins *v.* Fladgate, 242  
 Bassett, Coxo *v.*, 56  
   — Toovey *v.*, 327, 542  
 Bassil *v.* Lester, 444  
 Bastard, Polden *v.*, 156  
   — *v.* Proby, 557  
 Batchelor, *In re*; Sloper *v.* Oliver, 124  
   — Bennett *v.*, 184, 614  
 Bate *v.* Hooper, 365  
   — Southouse *v.*, 375, 376  
 Bateman *v.* Davis, 364  
   — *v.* Gray, 248, 252  
   — *v.* Hotchkin (10 B. 426), 433  
   — *v.* Hotchkin (31 B. 486), 645  
   — *v.* Pennington, 33  
 Bates, *In re*, 507  
   — Greenhalgh *v.*, 519  
   — Leech *v.*, 28  
   — Mackinley *v.*, 644  
   — Moffett *v.*, 82  
   — Olney *v.* 422, 605  
 Bateson, Newman *v.*, 139  
 Bath & Wells, Bishop of, Procter *v.*, 435  
 Bathurst *v.* Errington, 220, 221  
 Batley, Ford *v.*, 389  
 Bataford *v.* Kebbel, 413  
 Batt, Baker *v.*, 20  
 Batteley *v.* Windle, 614

- Batten *v.* Earnley, 142  
 Batterssea Park Acts, *Re*; Arnold,  
*Ex parte*, 205  
 Batteste *v.* Maunsell, 206  
 Battison, Minors *v.*, 194, 525, 526  
 Battyl *v.* Lyles, 46  
 Baxter's Trusts, *Re*, 408, 416  
 Baxter, A.-G. *v.*, 296  
   — *v.* Brown, 305  
   — *v.* Loah, 573  
 Bayldon, Baker *v.*, 262  
 Bayle *v.* Mayne, 55  
 Baylee *v.* Quin, 114  
 Bayley's Settlement, 223, 224  
 Bayley, A.-G. *v.*, 371  
   — *v.* Bishop, 388  
   — Millard *v.*, 96  
   — Sanderson *v.*, 258  
   — *v.* Snelham, 229, 231  
   — Wilson *v.*, 529  
 Baylis, *In bonis* (1 P. & D. 21), 77  
   — *In bonis* (1 Sw. & T. 613), 219  
   — *v.* A.-G., 208  
 Baynton, Perkins *v.*, 320  
 Bazett, Norton *v.*, 29  
 Beach, Hurst *v.*, 114, 117  
   — White *v.*, 100  
 Beachcroft *v.* Beachcroft, 212, 229,  
 230  
 Beal, Phillips *v.*, 472  
 Beale *v.* Connolly, 521  
   — *v.* Symonds, 612  
 Beales *v.* Crisford, 147, 266, 314  
   — *v.* Spencer, 467  
 Beamish *v.* Beamish, 576  
 Bean *v.* Griffiths, 452  
   — Lepine *v.*, 231, 527  
 Beard, Boulton *v.*, 421, 626  
   — *v.* Westcott, 435, 442  
 Beatham, Shepherd *v.*, 629  
 Beattie, Johnston *v.*, 4, 6  
 Beaty, Beaty *v.*, 53  
 Beauchamp *v.* Usticke, 219, 333  
 Beauclerk, Lord, Kenrick *v.* (3 B. & P.  
 178), 347, 352  
   — Doe d. Kenrick *v.* (11 East,  
 667), 451  
   — *v.* Dormer, 546  
   — *v.* Mead, 577  
 Beauclerk, St. Albans, Duke of, *v.*,  
 116  
 Beaufort, Granville *v.*, 616  
 Beaufoy's Estate, *In re*, 648  
 Beauman *v.* Stock, 573  
 Beaumont's Trusts, 306  
 Beaumont, Clifford *v.*, 456  
   — Darbison d. Long *v.*, 270  
   — *v.* Fell, 208  
   — *v.* Oliveira, 290, 629  
   — *v.* Salisbury, Marquis of, 351  
 Beaumont, Stackpoole *v.*, 454, 455  
   — *v.* Squire, 456  
 Beavan, *In bonis*, 34  
 Beaver, Lynn *v.*, 616  
   — *v.* Nowell, 331, 373, 573  
 Bebb *v.* Beckwith, 495  
 Beck's Trusts, *Re*, 505  
 Beck, Adams *v.*, 224  
   — Hale *v.*, 568  
 Beckett *v.* Harden, 56, 577  
   — *v.* Howe, 28  
 Beckford, Barrett *v.*, 593  
   — Peppin *v.*, 217  
 Beckton *v.* Barton, 487  
 Beckwith, Bebb *v.*, 495  
   — *v.* Beckwith, 505  
 Bective *v.* Hodgson, 198, 444  
   — Earl of, Hodgson *v.*, 137  
   — Kinlis, Lord, *v.*, 550  
 Beckton *v.* Barton, 248  
 Bedale, Boyes *v.*, 227  
 Beddard, Wilson *v.*, 23  
 Bedford, Duke of, *v.* Abercorn, Marquis  
 of, 561  
 Bedford *v.* Bedford, 640  
   — Carr *v.*, 295  
   — Dommett *v.*, 462  
   — Harris *v.*, 54  
   — Kirkpatrick *v.*, 114, 138  
   — Roe d. Thong *v.*, 336  
 Bedwell, Townley *v.*, 204  
 Beech, Chaworth *v.*, 109  
   — *v.* St. Vincent, Lord, 446  
 Beechey, Goblett *v.*, 95  
 Beeston *v.* Booth, 622  
 Beetham, Shephard *v.*, 803, 627  
 Beevor, Mainwaring *v.*, 137, 247, 248  
 Begley *v.* Cooke, 394  
 Belaney *v.* Belaney, 157  
   — *v.* Kelly, 380  
 Belbin *v.* Skeats, 23  
 Bell, *In bonis*, 77  
   — Alsop *v.*, 625  
   — *v.* Bell (15 Ir. Ch. 517), 333  
   — *v.* Bell (I. R. 6 Eq. 239), 621,  
 637  
   — Blann *v.* (2 D. M. & G. 775),  
 201, 375  
   — Blann *v.* (7 Ch. D. 382), 619,  
 624  
   — *v.* Cade, 413  
   — Consett *v.*, 9  
   — Dowson *v.*, 89  
   — *v.* Fothergill, 45  
   — Hanna *v.*, 240  
   — Ibbott *v.*, 32  
   — *v.* Kennedy, 4, 5, 7  
   — Logan *v.*, 72  
   — Newbegin *v.*, 618  
   — *v.* Phyn, 527, 529

- Bell, *Roe d. Ryall v.*, 97  
   — *Silcox v.*, 259  
 Bellairs *v. Bellairs*, 453  
 Bellamy, *In bonis*, 33  
   — *Brophy v.*, 367  
   — *Longworth v.*, 217  
 Bellasis' Trust, *In re*, 317  
 Bellasis *v. Uthwait*, 588  
 Bellingham, *Earle v.*, 138, 637, 638  
 Bellis' Trusts, *In re*, 169  
 Bempde *v. Johnstone*, 5  
 Benbow, *Early v.* 114  
   — *Storrs v.*, 248, 261, 436  
 Bench *v. Biles*, 634  
 Bending *v. Bending*, 88, 89  
 Bendisham, *Thellusson v.*, 271  
 Benet Coll. *v. London*, Bishop of, 92, 311  
 Bengal, Advocate-General of Lyons *v.*, 299  
 Bengough *v. Walker*, 588  
 Bennett, *In re*; *Kirk, Ex parte*, 102, 149  
 Bennett's case, 578  
   — *Trusts*, 412, 499  
 Bennett *v. Batchelor*, 184, 614  
   — *v. Bennett*, 219, 327  
   — *Bullock v.*, 456  
   — *Cox v.*, 123  
   — *Davis v.* (4 D. F. & J. 327), 253  
   — *v. Davis* (2 P. Wms. 316), 466  
   — *Dawes v.*, 579  
   — *Doe d. Guest v.*, 149  
   — *v. Honeywood*, 264, 302  
   — *v. Houldsworth*, 84, 587, 590  
   — *King v.*, 220  
   — *Lawes v.*, 204  
   — *v. Lowe*, 539  
   — *v. Lytton*, 363  
   — *v. Marshall*, 211  
   — *May v.*, 636  
   — *v. Tankerville*, Earl of, 336, 338  
   — *Thomas v.*, 592  
   — *Wilson v.*, 75  
 Benson *v. Benson*, 45  
   — *v. Maude*, 138  
   — *Pain v.*, 513  
   — *v. Whittam*, 385  
 Bent, *Cafe v.*, 202, 359  
   — *v. Cullen*, 392  
   — *Roffey v.*, 464  
 Bental, *Carter v.* 261  
 Bentham *v. Wilson*, 258  
   — *v. Wiltshire*, 360  
 Bentinck *v. Portland*, Duke of, 438  
 Bentley *v. Blizard*, 231  
   — *v. Meech*, 531  
   — *v. Oldfield*, 325  
   — *v. Robinson*, 633  
   — *Sherratt v.*, 578, 579  
 Bentinck, *Lowther v.*, 369  
 Benyon *v. Benyon*, 117  
 Berchtoldt, *Chatfield v.*, 395  
 Bergavenny, Lady, *Richards v.*, 342  
 Berkeley, *Clarke v.*, 456  
   — *Hussey v.*, 259  
   — *v. Pulling*, 242  
   — *v. Swinburne* (6 Sim. 613), 385  
   — *v. Swinburne* (16 Sim. 275), 244, 408  
 Berks *v. Berks*, 41  
 Bernal *v. Bernal*, 271  
 Bernard *v. Minshull*, 188, 379, 380  
   — *v. Montague*, 526  
   — *Sitwell v.*, 526  
 Bernasconi *v. Atkinson*, 213  
 Bernes, *Stanley v.*, 3, 7  
 Berrall, *Harris v.*, 36  
 Berridge, *Trafford v.* 186  
 Berry's Estate, *In re*; *Berry v. Berry*, 348  
 Berry *v. Askham*, 634  
   — *v. Berry*, 239, 245  
   — *v. Briant*, 247, 510  
   — *v. Gibbons*, 364  
   — *Gwynne v.*, 324, 542  
 Besant *v. Cox*, 487  
 Bescoby *v. Pack*, 148  
 Bessant *v. Noble*, 643  
 Best *v. Donmall*, 136  
   — *Scott v.*, 134  
   — *v. Stonehewer*, 263  
 Best's Settlement, 283  
 Bestall *v. Bunbury*, 16  
 Bewick *v. Orpen*, 124  
 Bethell *v. Abraham* (17 Eq. 24), 360  
 Bethel *v. Abraham* (22 W. R. 745), 588  
 Bethune *v. Kennedy*, 112, 201  
 Betts *v. Doughty*, 21, 69  
 Betty Smith's Trusts, *In re*, 405, 566  
 Bevan *v. A.-G.*, 108  
   — *v. Bevan*, 146  
   — *v. Waterhouse*, 126  
 Beverley, Mayor of, *v. A.-G.*, 300, 301  
   — *v. Beverley*, 476  
   — *Garland v.*, 213, 269  
   — *Taylor v.*, 370, 509  
 Bevis's Trusts, *Re*, 191  
 Beynon, *Doe d. Thomas v.*, 208, 212  
 Bianchi, *In bonis*, 7  
 Bibbens *v. Potter*, 473, 484  
 Bibby *v. Thompson*, 385  
 Bickham *v. Cruttwell*, 126, 642  
 Biddle *v. Perkins*, 433  
 Biddles *v. Biddles*, 385  
 Biddulph, *Fell v.*, 606  
   — *v. Lees*, 323, 536  
   — *v. Williams*, 181  
 Bide *v. Harrison*, 147

- Bielby, Todd v., 621  
 Biel's Estate, *In re*, 625  
 Bielefield v. Record, 524  
 Bifield's Case, 332  
 Bigg, Brown v., 198  
 Biggs, Doe v., 347  
 Bignall, Boreham v., 216, 217  
 Bignold v. Giles, 392  
 Biles, Bench v., 684  
 Billing, Tucker v., 268  
     — v. Welch, 459  
 Billingham v. Vickers, 20  
 Billings v. Sandon, 485  
 Billington, Goodtitle v., 474  
 Bills v. Crofts, 464  
 Bindon, Ld., v. Suffolk, Earl of, 483  
 Bindon, Sweetapple v., 557  
 Bingham, Cookson v., 319  
     — Ommaney v., 5  
     — Wheeler v., 455  
 Bingloe's Trust, *Re*, 173  
 Binns v. Nichols, 627  
     — Swallow v., 420  
 Birch v. Birch, 33  
     — v. Dawson, 150  
     — v. Sherratt, 637  
     — v. Wade, 265, 376  
 Birchall, *In re*; Wilson v. Birchall,  
     69  
 Bird v. Harris, 382, 398  
     — v. Hunsdon, 566  
     — v. Johnson, 466  
     — v. Luckie, 280  
     — v. Maybury, 413  
     — Morley v., 106  
     — v. Peagrum, 467  
     — v. Wood, 279  
 Birds v. Askey, 628  
 Birdsall v. York, 254  
 Birkett, *In re*, 585  
     — Eccles v., 413  
     — v. Vandercom, 15  
 Birkhead, Doe d. Clift v., 518  
 Birks, Parker v., 824, 532, 543  
 Birmingham, *In re*, 630  
     — v. Burke, 630  
     — v. Tufts, 221, 225  
 Biron, *In re*, 261, 539  
 Birt, *In bonis*, 33, 61  
 Biscoe v. Perkins, 348  
 Bishop, Bayley v., 388  
 Bishop v. Cappel, 264  
     — Collins v., 227  
     — v. Curtis, 72  
     — Sherer v., 241  
     — v. Wall, 17  
 Bishopp, Davenport v., 489  
 Bizzey v. Flight, 63  
 Black v. Jobling, 43  
 Blackall, Long v., 282, 285  
 Blackburn, Byne v., 385  
     — Guardhouse v., 21, 22  
     — Hobson v. (1 Add. 274), 12  
     — Hobson v. (1 M. & K. 571),  
         101, 165  
 Blackburne v. Stables, 342, 557  
 Blacket v. Lamb, 85  
 Blackhall v. Gibson, 328, 343, 345  
 Blacklow v. Laws, 354, 467  
 Blackman, *Re*, 210  
 Blackman, Hoste v., 170  
 Blackmore, Chick v., 149  
     — v. Smee, 510  
 Blackwell, *In bonis*, 219  
     — v. Bull, 267, 566  
     — v. Pennant, 215  
 Blackwood v. Borrowes, 358  
 Blagrove, Merlin v., 436  
 Blagrove v. Blagrove, 349  
     — v. Coore, 122, 219  
     — v. Hancock, 403  
 Blague v. Gold, 99  
 Blaiklock v. Grindle, 90  
 Blake's Estate, 225  
     — Trust, *In re*, 566  
 Blake, Allgood v., 259, 272, 314  
     — Barnett v., 93  
     — v. Blake, 121, 178  
     — v. Bunbury, 87  
     — Clarke v., 249  
     — Cooke v., 350  
     — v. Gibbs, 151  
     — v. Knight, 28  
     — v. Leigh, 91  
     — v. Luxton, 72  
     — Martin v., 142  
     — Perrin v., 337  
     — v. Peters, 645  
     — v. Shaw, 151  
     — Southam v., 254  
 Blakeney v. Blakeney, 376  
 Blamire v. Geldart, 579  
     — Mounsey v., 273  
 Bland v. Bland, 380  
     — v. Dawes, 468  
     — v. Lamb, 182, 189  
     — v. Wilkins, 608  
     — v. Williams, 416, 417  
 Blane, Tomkyns v., 85  
 Blann v. Bell (2 D. M. & G. 775) 201,  
     375  
     — v. Bell (7 Ch. D. 382), 619, 624  
 Blasson v. Blasson, 242, 418, 421  
 Blatch v. Wilder, 360  
 Blayney's Trust, *Re*, 214  
 Blase v. Burgh, 247, 410  
 Blawitt, *In bonis*, 34  
     — v. Roberts, 391  
 Blight, *In re*; Blight v. Hartnoll, 477  
 Blinston v. Warburton, 324, 543

- Blissett, Chapman *v.*, 246  
 Blizard, A.-G. *v.*, 294  
     — Bentley *v.*, 231  
 Blodwell *v.* Edwards, 238  
 Blount *v.* Hopkins, 125, 641  
 Blower's Trusts, 257  
 Blower, Lampley *v.*, 317, 373  
     — *v.* Morrett, 621  
 Bluett, Duncan *v.*, 558  
     — Muschamp *v.*, 459  
 Blundell's Trusts, *Re*, 293  
 Blundell, Bootle *v.*, 634, 642  
     — Camoys *v.*, 209  
     — Travers *v.*, 99  
 Blunt, Griffith *v.*, 408  
 Boardman *v.* Stanley, 77  
 Bockett, Cooper *v.*, 26, 28, 33  
 Boddam, Nevill *v.* (25 B. 554), 40,  
     507, 511  
 Boddam, Nevill *v.* (28 B. 584),  
     577  
 Boddington, Webster *v.*, 437, 438,  
 Boddy *v.* Dawes, 141  
 Bodenham *v.* Pritchard, 156  
 Bodens *v.* Galway, *Ld.*, 371  
 Boehm, Trafford *v.*, 546  
 Boetefeur, Lewis *v.*, 629  
 Boggis, Powell *v.*, 274, 372  
 Bolding *v.* Strugnell, 413  
 Bolitho *v.* Hillyar, 485, 500  
 Bolt, Gibson *v.*, 647  
 Bolton *v.* Bolton, 156, 326  
     — Doe d. Noble *v.*, 347, 350  
     — Parker *v.*, 382, 558  
     — *v.* Stannard, 363  
     — Townley *v.*, 394  
 Bon *v.* Smith, 278  
 Bonaker, New *v.*, 301  
 Bond, *In re*; Cole *v.* Hawes, 381  
     — *v.* Seawell, 24  
 Bone *v.* Cook, 604  
     — Shergold *v.*, 494  
     — *v.* Spear, 11, 54, 55  
 Bonham, Henrion *v.*, 396  
 Bonner *v.* Bonner, 118  
     — Fitzhenry *v.*, 568  
 Bonsall, Leman *v.*, 53  
 Boochar *v.* Samford, 155  
 Bookey, Randell *v.*, 615  
 Boon *v.* Cornforth, 186  
 Boosey *v.* Gardner (18 B. 471),  
     374  
     — *v.* Gardner (5 D. M. & G. 122),  
     477  
 Booth, *In re*; Fytton *v.* Booth, 284  
     — *v.* Alington (6 D. M. & G.  
     613), 109  
     — *v.* Alington (3 Jur. N. S. 835;  
     27 L. J. Ch. 117; 5 W. R.  
     811), 320  
 Booth, Beeston *v.*, 622  
     — *v.* Booth, 411, 416  
     — *v.* Carter, 309  
     — *v.* Coulton (7 Jur. N. S.), 202  
     — *v.* Coulton (5 Ch. 684), 638  
     — *v.* Dean, 215  
     — Fytton *v.*, 284  
     — Kirkman *v.*, 366  
     — *v.* Meyer, 460  
     — Pollock *v.*, 431  
     — Sillick *v.*, 513, 517, 520  
     — *v.* Vicars, 285, 286  
 Bootle, *In bonis*, 67  
     — *v.* Blundell, 634, 642  
 Boraston's Case, 397, 402  
 Boreham *v.* Bignall, 216, 217  
 Borer, Ross *v.*, 391, 392  
 Borlase *v.* Borlase, 36  
 Borman, Scarborough *v.*, 470  
 Borradaile, Dormay *v.*, 630, 633  
 Borrell, Tuffnell *v.*, 318, 329  
 Borrer, Shaw *v.*, 361, 631  
 Borrowes, Blackwood *v.*, 358  
 Bortoft *v.* Wadsworth, 247  
 Borton *v.* Dunbar, 185  
 Bosanquet, *In bonis*, 27  
 Bostock, Dimond *v.* 606  
 Boswell *v.* Dillon, 556  
 Botfield, Walcot *v.*, 458  
 Bothamley *v.* Sherson, 106, 125  
 Bott, Carpenter *v.*, 278  
     — Gibson *v.*, 142  
     — Poole *v.*, 408, 453  
 Boucher, Davis *v.*, 596  
 Boughy *v.* Moreton, 46  
     — Troutbeck *v.*, 466  
 Boughton *v.* Boughton (2 Ves. Sen.  
     12), 83, 90  
     — *v.* Boughton, (1 H. L. 406),  
     414, 436, 640  
     — Brudenell *v.*, 55  
     — *v.* James, 443  
     — *v.* Knight (3 P. & D. 64), 14  
     — Knight *v.* (3 B. 148; 11 Cl. &  
     F. 513), 380  
 Boulcott *v.* Boulcott, 576  
 Boulton, Att.-Gen. *v.*, 299  
     — Cherry *v.*, 124  
 Boulter, *In re*, 99  
     — Waldon *v.*, 261  
 Boulton *v.* Beard, 421, 626  
     — *v.* Pilcher, 418  
     — Raikes *v.*, 624  
 Bouquet, Fruer *v.*, 616  
 Bourke *v.* Ricketts, 138  
 Bourne *v.* Bourne, 193  
     — *v.* Buckton, 446  
     — Dawson *v.*, 316  
     — Wills *v.*, 629  
 Bousfield, Marshall *v.*, 557

- Bouskell, Campbell v., 331  
 Bouverie v. Bouverie, 511, 522  
 Bovill, A.-G. v., 294  
 Bovile, Emerson v., 57  
 Bowden v. Bowden, 201  
   — Gordon v., 636  
 Bowen v. Barlow, 167  
   — Freeman v., 464  
   — v. Scowcroft, 485  
 Bower, Doe v., 97  
   — v. Goalett, 473  
 Bowers v. Bowers, 486, 489, 511  
 Bowker v. Hunter, 616  
 Bowles v. Bowles, 222  
   — Carver v., 84, 440  
 Bowman v. Hodgson, 23  
   — Humble v., 73, 267  
   — Mullen v., 332  
 Bownas, Dunn v., 308  
 Bowness, Dobson v., 157, 158  
 Bowyer, A.-G. v., 297  
   — v. Currall, 502  
   — v. Douglass, 503  
   — Newsome v., 18  
 Box, *In re*, 125  
   — v. Barrett, 83  
 Boyce v. Boyce, 584  
   — v. Corbally, 457  
 Boyd v. Boyd (9 L. T. N. S. 166; 2  
   N. R. 486), 555  
   — v. Boyd (4 Eq. 305), 595  
   — Coote v., 116  
 Boydell v. Gollightly, 273  
 Boyes v. Bedale, 227  
   — v. Cook, 179  
 Boyle v. Boyle, 298  
 Boyne, Brennan v., 325  
 Boys v. Boys, 201  
   — v. Bradley, 277  
   — v. Morgan, 188  
   — v. Williams, 107  
 Boyse v. Rossborough, 21  
 Boyville, Desbody v., 490  
 Brabant, Doo v., 482  
 Brabazon, *In re*, 407  
 Brackenbury, A.-G. v., 178  
   — v. Gibbons, 244, 475  
 Brabbury, Mackenzie v., 434  
   — Weld v., 243, 244  
 Bradish v. Ellames, 186  
 Braddock, *In bonis*, 29, 30  
 Braddon v. Farrand, 614  
 Bradford v. Brownjohn, 649  
   — Buffar v., 384  
   — Emmins v., 280  
 Bradley, Baker v., 471  
   — v. Barlow, 419  
   — Boys v., 277  
   — Brock v., 481  
   — v. Cartwright, 345  
 Bradley, Doe d. Gigg v., 333  
   — Lister v., 412  
   — v. Peixoto, 459  
   — v. Westcott, 171, 376  
   — Wren v., 400  
 Bradshaw v. Bradshaw, 214  
   — v. Tasker, 292  
   — Weldon v., 153  
 Brady, Craven v., 452, 455, 464, 610  
   — Croker v., 612, 613  
   — v. Cubitt, 57  
 Bragg v. Dyer, 53  
 Braithwaite, Banks v., 143, 392  
   — Reed v., 261, 530  
   — Teasdale v., 381  
 Brame, Alexander v., 304, 305  
 Bramham, Ringrose v., 240, 248  
 Brancker, Cunliffe v., 244, 347, 348  
 Brander v. Brander, 644  
 Brandon v. Aston, 246  
   — Basan v., 119  
   — v. Brandon, 263  
   — v. Robinson, 461  
 Brandreth, A.-G. v., 294  
   — Byrom v., 144, 147  
   — Lucas v., 192, 275  
 Brane, Miall v., 88  
 Branstrom v. Wilkinson, 412  
 Brase, Pitcairn v., 210  
 Brasenose, A.-G. v., 300  
 Brassey v. Chalmers, 356  
 Bray, Hennessey v., 323  
   — v. Stevens, 633  
 Braybroke, Lord, v. Inskip, 168  
 Brazier, Doe v., 565  
 Bree v. Perfect, 409, 417  
 Breed's Will, *In re*, 141, 368  
 Breedon v. Tugman, 410  
 Bremmer v. Freeman, 3  
 Bremner, Marshall v., 200  
 Bremridge, Whitter v., 403  
 Brennan v. Boyne, 325  
 Brennan v. Brennan, 107, 293  
 Breslin v. Waldron, 215  
 Breton v. Mockett, 472  
   — v. Vachell, 612  
 Brett v. Horton, 253  
 Brewer, Sidgreaves v.; Fleetwood, *In re*, 64, 94, 183, 293  
 Brewster, *Re*, 45  
   — v. Angell, 561  
 Briant, Berry v., 247, 510  
 Brickenden v. Williams, 180  
 Bricker v. Whatley, 218  
 Brickwood, Watson v., 640  
 Bridge v. Abbott, 234  
   — v. Chapman, 341  
   — Huskinson v., 381  
 Bridger, Grant v., 575  
   — L. & S. W. Ry. Co. v., 346

- Bridger v. Ramsay, 536  
 Bridges v. Bridges, 183  
   — Fordyce v., 424  
   — v. Hales, 79  
   — Michell v., 281  
   — v. Strachan, 577  
 Bridgman v. Dove, 630, 639  
 Bridgnorth, Corporation of, v. Collins, 258  
 Bridle, *In re*, 121  
 Brierley, Fisher v., 118, 138  
 Briggs, Langdale, Lady, v., 106  
   — Martineau v., 577  
   — v. Oxford, Earl of, 438  
   — v. Penny, 379, 609  
   — v. Sharp, 154, 385  
   — v. Upton, 285, 286  
   — White v., 266, 321, 381, 560  
 Bright v. Larcher, 194, 636, 640  
   — v. Rowe, 513, 516  
   — Wall v., 170  
 Brindley v. Partridge, 365  
 Brine v. Ferrier, 114, 116  
 Briscoe, Barton v., 470  
 Bristol, Countess of, v. Hungerford, 198, 382  
   — Mayor of, A.-G. v., 300  
 Bristow, Buckle v., 289  
   — v. Bristow, 118  
   — v. Skirrow, 180  
   — v. Warde, 442  
   — Weeds v., 258  
 Bristowe, A.-G. of British Honduras v., 199  
 British Museum, White v. (6 Bing. 310), 29  
   — v. White (2 S. & St. 595), 302  
 Britnell, Thomas v., 632  
 Britten, Green v. (42 L. J. Ch. 187), 82, 310  
   — Green v. (1 D. J. & S. 649), 203, 468  
   — Morgan v., 318  
 Britton, Potts v., 463  
   — v. Twining, 372  
 Broadhurst v. Morris, 333  
 Brock v. Bradley, 481  
 Bruckett, Chamberlayne v., 297, 298, 299, 310  
 Brocklehurst v. Flint, 600  
 Brodie v. Barry, 90  
   — v. Chandos, Duke of, 309  
 Brogden v. Brown, 15  
 Bromfield v. Crowder, 403  
 Bromhead v. Hunt, 578  
 Bromley, Chilcott v., 215  
   — Fillingham v., 452  
   — v. Wright, 153, 555  
 Bronsdon v. Winter, 104  
 Brook's Will, *Re* (2 D. & S. 382), 474  
 Brook's Will, *Re* (18 W. R. 573), 579  
 Brook v. Badley, 308, 304, 306  
   — v. Brook, 328, 376  
   — Fleming v., 151, 185  
 Brookes, *In bonis*, 39  
   — *In re*; Brookes v. Brookes, 634  
   — Clifford v., 334  
   — Dewar v., 410  
   — Donoghue v., 261  
   — Eccard v., 492  
   — v. Garrod, 457  
   — v. Kent, 39  
   — v. Pearson, 462  
   — Prentice v., 373  
   — v. Turner (7 Sim. 671), 151  
   — v. Turner (2 Bing. N. C. 422), 442  
   — Lord, v. Warwick, Earl of (2 De G. & S. 425), 122  
   — Lord, v. Warwick, Earl of (1 H. & T. 142), 639  
 Brooker, Franks v., 217  
 Brookes, Palin v., 102  
 Brooking, Crook v., 64  
   — Maybery v., 149  
 Brookman's Trust, *Re*, 602  
 Brookman v. Smith, 270, 272, 475, 483  
   — Violet v., 456  
 Brooks, Keating v., 26  
   — Maybank v., 601  
   — Starkey v., 383  
   — Tabor v., 367  
 Broome, Longmore v., 250, 491  
   — v. Monck, 204  
   — Weigall v., 164  
 Brophy v. Bellamy, 367  
   — Clinton v., 629  
 Brotherton v. Bury, 489  
 Broughton, Gowan v., 619, 620  
   — v. Langley, 336  
 Brouncker v. Bagot, 371  
 Brown and Sibley, *In re*, 169, 440  
 Brown, *In bonis*, 58, 77  
 Brown's Settlement, *In re*, 359  
   — Trusts, *In re*, 188, 232, 533  
 Brown v. Adv.-G., 9  
   — v. Bamford, 471  
   — Baxter v., 305  
   — v. Bigg, 193  
   — Brogden v., 15  
   — v. Brown (8 E. & B. 876), 46, 47, 58  
   — v. Brown (6 W. R. 613), 147, 149  
   — v. Brown (1 Kee. 275), 622  
   — Cattlin v., 427, 430, 437  
   — Chapman v., 307, 585  
   — Comfort, v., 372  
   — v. Farrant, 54  
   — Garland v., 434, 435  
   — v. Gellatly, 200, 646, 647

- Brown, Greville v., 641  
   — v. Higgs, 265, 570  
   — v. Jarvis, 255, 394  
   — Keeling v., 632  
   — Lucknow v., 368  
   — Mackleston v., 616  
   — Miels v., 112  
   — Oddie v., 433, 619  
   — Osborn v., 490  
   — v. Peck, 400  
   — Pickford v., 626  
   — v. Pocock, 251  
   — v. Smith (15 B. 444), 5  
   — v. Smith (10 Ch. D. 377), 368  
   — Torre v., 164  
   — Upton v., 280  
   — v. Whiteway, 351  
   — v. Wood, 275  
 Browne's Will, *Re*, 389  
 Browne v. Browne, 401, 404  
   — Clark v., 120  
   — v. Collins, 134, 644  
   — Everall v., 184  
   — Greville v., 633  
   — v. Groombridge, 119, 240, 618, 625  
   — v. Hammond, 406, 605  
   — v. Hope, 603  
   — Knight v., 462  
   — Lambert v., 347, 355  
   — O'Toole v., 153  
   — v. Paull, 385  
   — v. Rainsford, 506  
   — v. Stoughton, 432  
   — Thompson v., 9  
   — Torre v., 142, 636  
 Browning, Harford v., 288  
 Brownjohn, Bradford v., 649  
 Brownlow, Earl, Egerton v., 451, 452, 556  
 Brownrigg, Campbell v., 378  
 Brownsamith, Wilson v., 104  
 Brownson v. Lawrance, 131, 132  
 Brownsword v. Edward, 528, 529  
 Bruce v. Bruce, 5, 173, 176  
   — Jones v., 641  
 Brudenell v. Boughton, 55  
   — v. Elwes, 435, 476  
 Brummel v. Prothero, 642  
 Brunel v. Brunel, 3  
 Brunaden v. Woolridge, 295  
 Brunt v. Brunt, 36  
 Brunton, Mostyn v., 413  
 Brutton, Winch v., 379  
 Bryan, *In re*; Godfrey v. Bryan, 322  
 Bryan's Trust, 217  
 Bryan v. Collins (16 B. 14), 222, 449  
   — v. Collins (15 B. 17), 445  
 Bryan, Godfrey v., 322  
   — v. Twigg, 395  
 Bryan v. White, 22  
 Bryant v. Easterson, 472  
   — Owen v., 232  
 Bryce, *In bonis*, 23  
   — Macdonald v. (2 Kee. 276), 444  
   — Macdonald v. (16 B. 581), 509  
 Bryden v. Willett, 260, 533  
 Brydges v. Landen, 632  
   — v. Phillips, 640  
   — v. Wotton, 288  
 Bryer, Shelley v., 257  
 Bryning, Redfern v., 583  
 Bubb v. Padwick, 526  
   — Pride v., 16  
   — v. Yelverton, 288  
 Buccleuch, Duchess of, *R. v.*, 154  
 Buchanan, Fleming v., 624  
   — v. Harrison, 269  
   — Russell v., 402, 403  
 Buck, Lanphier v., 321, 498, 499  
   — Turner v., 137  
   — Vaughan v., 201  
   — d. Whalley v. Nurton, 155  
 Buckeridge v. Ingram, 55  
 Buckland, Armstrong v., 99  
   — A.-G. v., 295  
   — v. Barton, 171  
   — Court v., 196  
 Buckle v. Bristow, 289  
   — v. Buckle, 54  
 Buckley v. Howell, 354  
   — Radcliffe v., 240  
   — Stafford, Earl of, v., 388  
 Buckmaster, Hamilton v., 157, 158  
 Buckner, Doe d. Spearing v., 158  
 Buckton, Bourne v., 446  
   — v. Hay, 431  
 Budd, *In bonis*, 41  
   — Moore v., 5  
 Buffer v. Bradford, 334  
 Buggins v. Yates, 379  
 Bull, Blackwell v., 267, 566  
   — v. Cumberbach, 274, 372  
   — Constable v., 473, 484  
   — Doughty v., 193  
   — Johnson v., 64  
   — v. Kingston, 376  
   — v. Pritchard, 409  
   — v. Vardy, 570  
 Buller, Flower v., 16  
 Bulley's Estate, *Re*, 410  
 Bulling v. Ellice, 215  
 Bullock v. Bennett, 456  
   — Devereux v., 55  
   — v. Downes, 276, 277, 282  
   — Hunter v., 585  
   — Spencer v., 422  
 Bulmer, Clapton v., 281  
 Bult, Gough v., 386, 584  
 Bulteel v. Plummer, 173



- Bunbury's Trusts, *In re*, 288  
 Bunbury, Bestall v., 16  
     — Blake v., 87  
     — v. Doran, 327  
     — Knocker v., 355  
     — Ludlow v., 459  
 Bunn, *In re*; Isaacson v. Webster, 418  
     — Lord v., 468  
 Bunny v. Bunny, 43  
 Bunting v. Marriott, 297, 307  
 Burbey v. Burbey, 258  
 Burbidge v. Burbidge, 151  
 Burchell, King v., 345  
     — M'Mahon v., 124  
 Burchett v. Durdant, 269  
     — Goodfellow v., 588  
 Burdett, O'Mahoney v., 478, 486  
     — Powis v., 416, 419  
     — v. Young, 579  
 Burgess v. Burgess, 288  
     — Carver v., 509, 512  
     — Ransome v., 368  
     — v. Robinson, 451  
     — v. Wheate, 612  
 Burgh, Bleasde v., 247, 410  
 Burgoyne v. Showler, 28  
 Burke v. Annis, 327  
     — Birmingham v., 630  
     — v. Jones, 629  
     — v. Moore, 23, 28  
     — Roseingrave v., 135  
 Burley's case, 342  
 Burlingham, Mann v., 306  
 Burls v. Burls, 47  
 Burne, Gillow v., 54  
     — Hollier v., 648  
 Burnell, Foley v., 553  
 Burnet, Armstrong v., 125  
     — v. Mann, 15  
 Burney, Abbiss v., 430, 549  
 Burnie v. Getting, 147  
     — Moffatt v., 240, 393  
 Burnsall, Doe d. Davy v., 315, 332  
 Burra, Thompson v., 87, 89  
 Burrell v. Beakerfield, 192, 422  
     — v. Crutchley, 552  
     — Tufnell v., 504  
 Burrough v. Philcox, 570  
 Burroughes, Woolmore v., 560  
 Burrow's Trusts, 216  
 Burrows, Woolmore v., 266  
 Burrows v. Burrows, 54  
     — Fleming v., 182, 185  
     — Woolmore v., 558  
 Burslem, Vaughan v., 552  
 Burstall, Lightfoot v., 191  
 Burt v. Hillyar, 266, 492, 498  
     — v. Sturt, 446, 619  
 Burtenshaw, Evans d. Weston v., 270  
     — v. Gilbert, 46, 58  
 Burton v. Burton, 365  
     — Morris v., 143  
     — v. Mount, 201  
     — v. Newbery, 63  
     — v. Power, 326  
 Burville, Doe d. Burden v., 571  
 Bury, Brotherton v., 489  
     — Peyton v., 399, 450  
 Bush, Adams v., 222  
     — v. Cowan, 177  
     — Davies v., 621  
     — Morrow v., 638  
 Bushell, Fairfield v., 260  
 Busk, Addison v., 568  
     — v. Aldam, 181  
 Busell v. Marriott, 53  
 Bussey, Hodgson v., 371  
 Bustard, Saunders v., 316  
 Butcher, *Ex parte*; Mallor, *In re*, 366,  
     367  
     — Ommaney v., 144, 188, 291,  
     298, 616  
     — Smith v., 273  
 Butte, Marquis of, Stuart v., 184  
 Butler, Clarke v., 112  
     — Cunningham v., 99  
     — Falkner v., 187, 257  
     — Gerrard v., 377  
     — v. Gray, 176, 378, 570  
     — Izon v., 602  
     — v. Lowe, 248, 252  
     — v. Ommaney, 373, 497  
     — Quinn v., 40, 41, 577  
     — Sadler v., 86  
     — Smith v., 144, 147  
     — v. Stratton, 262  
     — Vinnicomb v., 23  
 Butlin, Barry v., 20  
 Butt's case, 387, 391  
 Butt v. Thomas, 563  
 Butterfield v. Butterfield, 371  
 Buttery v. Robinson, 387  
 Butts, Trower v., 249  
 Byam v. Munton, 196  
 Byne v. Blackburn, 385  
 Byng v. Byng, 334  
     — Fraser v., 116  
     — v. Strafford, Ltd., 473  
     — Webb v., 96, 98, 154  
 Byrd, *In bonis*, 26, 81  
 Byrnes, *In re*, 79  
 Byrom v. Brandreth, 144, 147  
 Byron, Leigh v., 228  
 Bythessa v. Bythessa, 533  
 CABLE v. Cable, 282  
 Caddell, French v., 542  
     — v. Palmer, 424, 434  
 Cade, Bell v., 413

- Cadett v. Earle, 150  
 Cadge, *In bonis*, 33  
 Cadman v. Cadman, 205  
 Cadogan, Ames v., 174  
 Cadywold, *In bonis*, 35, 57  
 Cafe v. Bent (5 Ha. 24), 202  
   — v. Bent (3 Ha. 245), 359  
   — Doe d. Kimber v., 351  
 Caffray, Kinsella v., 569  
 Caldecott v. Caldecott, 200  
   — v. Harrison, 258  
 Caldwell v. Cresswell, 400, 457  
 Callender, Wright v., 390, 636  
 Calless, Jones v., 619  
 Callow, Allen v., 115, 116  
   — Nelson v., 433  
 Calvert v. Armitage, 628  
   — Jackson v., 374  
   — v. Sibbon, 287  
   — Wrightson v., 243  
 Cambridge v. Rous (8 Ves. 14), 183,  
   484, 512, 516  
   — v. Rouse (25 B. 574), 376, 479  
 Camden, Ld., Garrick v., 276  
   — Marquis of, Walker v., 284,  
   285  
 Camm, Goulder v., 468, 470  
 Camoys v. Blundell, 209  
 Campbell v. Bouskell, 331  
   — v. Brownrigg, 378  
   — v. Campbell (4 B. C. C. 15), 320  
   — v. Campbell (L. R. 1 Eq. 388),  
   587  
   — Candy v., 544  
   — v. French, 577  
   — v. Harding, 540  
   — v. M'Conaghy, 631  
   — v. M'Grain, 185, 186  
   — Mansergh v., 393  
   — Menteith v.; Wilson, *In re*, 16,  
   17  
   — v. Prescott, 184  
   — v. Radnor, Earl of, 116  
   — v. Sandys, 72  
   — Smith v., 263  
 Cancellor v. Cancellor, 253, 332  
 Candy v. Campbell, 544  
 Cant's Estate, *Re*, 457  
 Canterbury, Archbishop of, Paice v.,  
   301, 304, 578  
 Cantillon's Minors, *In re*, 411  
 Capdevielle, *In re*, 3  
 Cape v. Cape, 314, 468  
 Capel v. Girdler, 122  
 Caplin's Will, *Re*, 263, 264, 265  
 Cappel, Bishop v., 264  
 Capper, Fry v., 440  
 Capron v. Capron, 135  
 Carbery v. Cox, 297  
   — Ld., Freke v., 1, 424  
 Carden v. Tuck, 155  
 Cardigan v. Curzon Howe, 540  
   — Eales v., 395  
 Cardross Settlement, *In re*, 357  
 Careless v. Careless, 210  
   — Rachfield v., 615, 616  
 Carew, Lloyd v., 336  
 Carey v. Carey, 491  
 Carlyon v. Truscott, 348, 359  
 Carmarthen, Ld., Holderness, Lady, v.,  
   388  
 Carmichael v. Gee, 636  
 Carne v. Long, 93, 291, 430  
 Carpenter v. Bott, 278  
 Carr v. Bedford, 295  
   — v. Carr, 147  
   — v. Collins, 199  
   — v. Eastabrooke, 592  
   — v. Errol, Earl of, 551, 552  
   — v. Griffith, 135  
   — v. Ingleby, 390  
   — Messeena v., 389  
 Carrick v. Errington, 610  
   — Ralph v., 260, 263, 448, 564,  
   566, 619  
   — Wandesforde v., 548  
 Carrington, Ld., v. Payne, 577  
 Carrington, Pearce v., 249  
 Carron Company v. Hunter, 134  
 Carte v. Carte, 122  
 Carter, Barnardiston v., 476  
   — Booth v., 309  
   — v. Bental, 261  
   — v. Carter, 462  
   — v. Church, 397  
   — Coulthurst v., 495  
   — Gosling v., 362  
   — v. Green, 310  
   — Lovejoy v., 239  
   — Nelson v., 106, 109  
   — v. Salt, 637  
   — v. Taggart, 113, 187  
   — White v., 558  
   — Wyman v., 349  
 Carthew v. Enraght, 250, 570  
 Cartier, Howgrave v., 419  
 Cartwright, Bradley v., 345  
   — v. Cartwright (1 Phillim. 90), 15  
   — v. Cartwright (3 D. M. & G.  
   982), 452  
   — Corser v., 361  
   — Hibblethwait v., 240  
   — Taylor v., 597  
   — v. Vaudry, 228  
 Carus, Townshend v., 290  
 Carver v. Bowles, 84, 440  
   — v. Burgess, 509, 512  
 Carveth v. Heiron, 279  
 Carwardine v. Carwardine, 474  
 Cary v. Abbot, 293

- Casamayor v. Strode, 523  
 Casborne v. Scarfe, 167  
 Case v. Drosier, 432  
 Casement v. Fulton, 24, 29  
 Casmore, *In bonis*, 25  
 Casson v. Dade, 29  
 Casterton v. Sutherland, 251  
 Castle v. Eate, 397  
   — v. Fox, 98, 103  
   — v. Gillett, 633  
   — Torre v., 11, 55  
 Castledon v. Turner, 211  
 Catherine's Coll., St., Farrar v., 43, 574  
 Catherine Hall, A.-G. v., 431, 459  
 Catley, Hayes v., 181  
 Catlow, Peel v., 495  
 Cator, Sparkes v., 588  
 Catt's Trusts, 461  
 Cattley v. Vincent, 477  
 Cattlin v. Brown, 427, 430, 437  
 Caunt, Gibbons v., 56  
 Cautley, *Re*, 149, 169  
   — Foster v., 600  
 Cavan, Lady, v. Poultney, 84  
 Cave, Farquharson v., 9  
 Cavendish v. Cavendish, 358  
   — Lowther v., 400  
 Cawood v. Thompson, 309  
 Cayley, Waldo v., 302  
 Chadock v. Cowley, 545  
 Chadwick, Bamford v., 541  
 Chadwin, *Ex parte*, 623  
 Chaffers v. Abell, 410  
   — Howard v., 631  
 Chaine, O'Hara v., 88  
 Chalie, Maitland v., 532  
 Chalk, Roosa v., 614, 617  
 Challenger v. Shepherd, 328  
 Challis, Evers v., 475  
   — Doe v., 436, 477  
 Chalmer, Anstruther v., 3  
   — Douglas v., 485  
 Chalmers, Brassey v., 356  
   — v. Storril, 88  
 Chamberlain v. Hutchinson, 180  
 Chamberlayne v. Brockett, 297, 298,  
   299, 310  
   — v. Chamberlayne, 342  
   — Phillips v., 874  
   — Robinson v., 54  
 Chambers v. Chambers, 109  
   — v. Goldwin, 140  
   — Gratrix v., 390  
   — Jacques v. (2 Coll. 435), 101  
   — Jacques v. (4 Rail. Cases, 499),  
   125  
   — Manning v., 465  
   — Norris v., 18  
   — Ongley v., 156  
   — v. Smith, 463  
 Chambers v. Taylor, 269  
 Chanier, Fuller v., 342  
 Chamney, *In bonis*, 29  
 Champion, Edwards v., 313  
 Champney v. Davy, 188, 298, 309, 312  
 Champneys, Mostyn v., 162  
 Chancey's Case, 594  
 Chandler v. Howell, 304  
   — v. Pocock, 178  
 Chandless v. Price, 371  
 Chandos, Duke of, Brodie v., 309  
   — Duke of, Freeman v., 163  
   — Duke of, v. Talbot, 407  
 Chaplin's Will, *Re*, 608  
 Chaplin v. Chaplin, 388  
 Chapman, *In bonis*, 59  
 Chapman's Case, 266  
   — Will, 497  
 Chapman, Arnold v., 608  
   — v. Blissett, 246  
   — Bridge v., 341  
   — v. Brown, 307, 585  
   — v. Chapman (4 Ch. D. 800), 182  
   — v. Chapman (33 B. 556), 284  
   — Doe d. Birkett v., 158  
   — Forth v., 541  
   — v. Hart, 122, 144, 151  
   — Heath v., 293  
   — Hill v., 244, 246  
   — Howse v., 618, 620  
   — Maddeson v., 85  
   — Maddison v., 405, 415  
   — Miller v., 491  
   — Nugee v., 184, 598  
   — Peat v., 601  
   — v. Reynolds, 145  
 Charge v. Goodyer, 259  
 Charitable Donations, Commissioners  
   of, v. Sullivan, 299  
 Charitable Donations, Commissioners  
   of, v. Walsh, 293  
 Charles, Evans v., 287  
   — Smith v., 527  
 Charlton v. Coombes, 455  
   — Hindmarsh v., 26, 30  
   — v. Rendall, 559  
 Charmer, Kell v., 95, 208  
 Charter v. Charter, 209, 213, 214  
 Chatfield v. Berchtoldt, 395  
 Chattaway, Salt v., 196, 640  
 Chatteris v. Young (2 Russ. 184), 118  
   — v. Young (Beames on Costs,  
   390), 626  
 Chaudière Mining Co. v. Desbarats, 93  
 Chawner's Will, *In re*, 363  
 Chaworth v. Beech, 109  
 Cheek, Stokes v., 389  
 Cheeke, Luxford v., 398, 406  
 Cheese, Culsha v., 602  
   — v. Lovejoy, 44

- Cheese, Tench *v.*, 444, 640  
 Chell *v.* Chell, 524  
 Chellen *v.* Martin, 405  
 Cheney's Case, Lord, 210  
 Cherry *v.* Boulton, 124  
   — *v.* Mott, 297  
 Cheshire, Hunter *v.*, 496  
 Cheslyn, Cresswell *v.*, 190, 607, 619  
 Chesnut, Wilson *v.*, 546  
 Chester, Bishop of, A.-G. *v.*, 297  
   — *v.* Chester (3 P. W. 56), 162  
   — *v.* Chester (12 Eq. 444), 304, 311, 614  
   — *v.* Painter, 139  
   — *v.* Phillips, 273  
   — *v.* Powell, 126  
 Cheyne, Eccles *v.*, 605  
 Chichester, Lord, *v.* Coventry, 589, 590  
   — Doe *v.*, 83  
 Chick *v.* Blackmore, 149  
 Chidgey *v.* Whitby, 140  
 Chilcott *v.* Bromley, 215  
 Child *v.* Child, 365  
   — *v.* Giblett, 490  
   — Johnson *v.*, 126  
 Children, Paul *v.*, 229  
 Chinnery's Estate, *In re*, 535  
 Chitty *v.* Parker, 198  
   — White *v.*, 465  
   — Williams *v.*, 482, 620  
 Choat *v.* Yeates, 618  
 Chorley *v.* Loveland, 222  
 Cholmeley, Cockerell *v.*, 354  
   — *v.* Paxton, 354  
 Cholmondeley *v.* Cholmondeley, 384  
 Chorlton, Doe d. Burrin *v.*, 333  
 Christ's Hospital *v.* Grainger, 424  
 Christian, *In bonis*, 30  
   — *v.* Devereux, 288  
   — Hull *v.*, 396  
 Christie *v.* Goaling, 489, 556, 558  
 Christmas *v.* Whinyates, 33  
 Christopher, Christopher *v.*, 56  
 Christopherson *v.* Naylor, 496  
 Christy, Rycroft *v.*, 467  
 Church, Carter *v.*, 397  
   — *v.* Mundy, 163  
 Churchill *v.* Churchill, 85, 377  
   — *v.* Dibbin, 172  
   — *v.* Marks, 460  
   — Oxford *v.*, 259  
   — Worlidge *v.*, 513, 517  
 Churchman *v.* Ireland, 89  
 Churton *v.* Douglas, 151  
 Circuit *v.* Perry, 189, 574  
 Clache's Case, 571  
 Clancy, *Re*, 308  
 Clapton *v.* Bulmer, 281  
 Clapham, Hood *v.*, 201  
 Clare, Crossley *v.*, 262  
 Claridge *v.* Arnold, 327  
   — Doe *v.*, 352  
 Clark, *Re*, 572, 573  
 Clark's Estate, *In re*; Maddick *v.* Marks, 177  
 Clark's Case, 24  
 Clark's Estate, *Re*, 502  
 Clark's Trusts, *In re*, 291, 430  
 Clark *v.* Browne, 120  
   — Dawson *v.*, 614  
   — Dew *v.*, 14  
   — *v.* Henry, 487, 488, 489  
   — Padbury *v.*, 86  
   — *v.* Panopticon, Royal, 363  
   — *v.* Phillips, 608  
   — *v.* Seymour, 358  
   — Smart *v.*, 484  
   — Tate *v.*, 345  
   — *v.* Taylor (1 Dr. 642), 296  
   — Taylor *v.* (1 Ha. 161), 646  
   — Williams *v.*, 410  
 Clarke, *In bonis*, 23, 24  
 Clarke's Estate, *Re*, 240  
 Clarke *v.* Abbott, 167  
   — *v.* Berkeley, 456  
   — *v.* Blake, 249  
   — *v.* Butler, 112  
   — *v.* Clarke (5 L. R. Ir. 47), 23  
   — *v.* Clarke (1 L. R. 2 C. L. 395), 72  
   — *v.* Clarke (8 Sim. 59), 248  
   — *v.* Clemmans, 601  
   — *v.* Colls, 279  
   — Counden *v.*, 270  
   — Dawson *v.*, 382  
   — De Serre *v.*, 423  
   — Dicken *v.*, 404  
   — Doe *v.*, 249  
   — *v.* Hilton, 382, 609  
   — Hodgson *v.*, 213  
   — *v.* Hogg, 369  
   — Holloway *v.*, 56  
   — *v.* Lubbock, 490  
   — Mason *v.*, 314  
   — Newton *v.*, 29  
   — *v.* Parker, 455, 457  
   — Penny *v.*, 321  
   — Pigg *v.*, 266  
   — Prevost *v.*, 381, 384  
   — *v.* Scripps, 46  
   — *v.* Sewell, 139  
   — Tate *v.*, 373  
 Clarkson *v.* Clarkson, 36  
   — Grayburn *v.*, 365  
   — Holloway *v.*, 376  
   — Rymer *v.*, 53  
   — Surridge *v.*, 262  
 Clauston, Elwes *v.*, 113  
 Clavering, Armstrong *v.*, 215

- Clavering v. Ellison, 452, 458  
 Claxton, Smith v., 198  
     — Wardle v., 468  
 Clay and Tetley, *In Re*, 361, 362  
 Clay v. Coles, 396  
     — v. Pennington, 373, 496  
     — v. Rufford, 358  
 Claydon, Wheeler v., 631  
 Clayton v. Gregson, 95  
     — Leavers v., 291, 298  
     — v. Lowe, 488, 489  
     — v. Nugent, Lord, 96, 208  
 Cleare v. Cleare, 14, 20  
 Cleary's Trust, 333, 372  
 Cleaton, Robinson v., 386  
 Cleaver v. Sparling, 455  
 Cleghorn, Moore v., 328  
 Cleland's Trusts, *In re*, 192  
 Clement, Addis v., 185  
     — Essex v., 514  
 Clements v. Paake, 537  
 Clemmans, Clarke v., 601  
 Clemon, Francis v., 634  
 Clennell v. Lewthwaite, 616  
 Clergy Society, *Re*, 297  
 Clerke v. Day, 342  
 Cleveland, King v., 284, 285, 492  
     — Duchess of v. Meyrick, 150  
 Clifford v. Beaumont, 456  
     — v. Brooke, 334  
     — v. Clifford, 171, 178  
     — v. Koe, 334  
     — v. Lewis, 631  
 Clifton v. Goodburn, 229  
     — Oxford, University of, v., 331  
     — Wintour v., 87  
 Clinch, Southgate v., 273  
 Cline's Estate, *In re*, 135  
 Clinton, Baroness, Kerr v., 578  
     — v. Brophy, 629  
 Clitheroe, Middleton v., 310  
 Clive v. Clive (7 Ch. 433), 135, 561  
     — v. Clive (Kay 600), 125, 134  
     — Thompson v., 499  
 Clogstoun v. Walcott, 174  
 Cloncurry, Lord, De Roebuck v., 144  
 Clough v. Clough, 16, 120  
     — v. Wynne, 375  
 Clowdley v. Felham, 683  
 Clowes, Crowder v., 118  
     — v. Hilliard, 282  
 Cloyne, Bishop of, v. Young, 615  
 Cluff v. Cluff, 304  
 Clulow's Trust, *Re*, 447, 448  
 Clune v. Apjohn, 600  
 Clutterbuck v. Clutterbuck, 643  
 Coard v. Holderness, 158  
 Coates, Armitage v., 430  
     — v. Hart, 528, 572  
     — Nash v., 338  
 Coates v. Needham, 397  
     — v. Stevens, 72, 86  
 Cobb, Riatton v., 215, 375  
 Cock v. Cock, 566  
     — v. Cooke, 11  
 Cockayne v. Harrison, 472  
 Cockell, Rich v., 90  
 Cockeram, Evans v., 127, 642  
 Cockerell v. Barber, 288  
     — v. Cholmeley, 354  
     — Garrett v., 545  
     — Stuart v., 434, 436  
 Cockill, Nicklison v., 622, 629  
 Cockrell v. Cockrell, 6  
 Cocks, Barber v., 489  
     — v. Manners, 93, 291  
     — Simmonds v., 402, 403  
 Cockshott v. Cockshott, 566  
 Codrington, All Souls Coll. v., 101  
 Coe's Trust, 462  
 Coe v. Bigg, 321  
 Cofield v. Pollard, 179  
 Cogan v. Duffield, 559  
     — v. Stevens, 198  
 Coghlan, Inglefield v., 468  
 Coke, Parsons v. (4 Dr. 296), 373  
     — Parsons v. (6 W. R. 715), 386  
 Colbeck, Jones v., 265  
 Colberg, *In bonis*, 44  
 Colclough v. Colclough, 325, 343, 345  
 Coldwell v. Holme, 297  
 Cole, Adnam v., 114, 291, 298  
     — v. Fitzgerald, 150, 186  
     — v. Goble, 541  
     — v. Hawes, 381  
     — v. Scott, 162  
     — v. Sewell, 424, 425, 426, 428,  
         431  
     — v. Wade, 265  
     — v. Willard, 594  
 Coleby v. Coleby, 130  
 Colegrave v. Manby, 123  
 Coleman and Jarrom, *In re*, 606  
 Coleman, Baile v., 336  
     — Horn v., 277  
     — v. Seymour, 221, 250  
 Coles, *In bonis*, 11  
 Coles' Will, 143  
 Coles, Clay v., 396  
     — Inc. Church Building Society  
         v., 303, 312  
     — Wilson v., 198  
 Colleton v. Garth, 122  
 Collett v. Collett, 450, 531  
     — Thrupp v., 215, 298, 299  
 Colley, *In bonis*, 66  
 Colley's Trust, *Re*, 606  
 Collier, Lantsbery v., 359, 483  
     — v. McBean, 336  
     — v. Squire, 184

- Collier v. Wakeman, 194  
   — v. Walters, 351  
 Collin, Wilkes v., 146, 167  
 Collingwood v. Pace, 275  
   — v. Row, 204  
   — v. Stanhope, 223  
 Collins' Trusts, *In re*, 276  
 Collins v. Bishop, 227  
   — Bridgnorth, Corporation of, v., 258  
   — Browne v., 134, 644  
   — Bryan v. (16 B. 14), 222, 449  
   — Bryan v. (15 B. 17), 445  
   — Carr v., 199  
   — v. Collins (12 Eq. 455), 144  
   — v. Collins (2 M. & K. 703), 202  
   — Doe v., 155  
   — v. Doyle, 147  
   — Fox v., 211  
   — Howard v., 508, 512  
   — v. Lewis, 620, 627  
   — v. Macpherson, 520  
   — Tolson v., 593  
   — White v., 342  
 Collinson v. Pater, 305  
 Collis, Doe d. Cooper v., 344  
   — v. Robins, 639, 642  
 Collison, *In re*, 525  
   — v. Barber, 525  
 Colls, Clarke v., 279  
 Colman, *In bonis*, 29  
 Colman, Cruwys v., 267  
   — Smith v., 487  
   — v. Tyndall, 351  
 Colpoys v. Colpoys, 107  
 Colquhoun, Wroughton v., 390, 636  
 Colshead, *Re*, 554  
   — Wall v., 195  
 Colt, Toldervy v., 477  
 Colthurst, Tomkins v., 620  
 Coltman, Davenport v., 152, 198  
 Colton, *In re*, 141  
   — Greetham v., 631  
 Coltsman v. Coltsman, 324, 325, 543  
 Colville v. Middleton, 110, 638  
 Colvin v. Fraser, 46  
 Colyear, Doe d. Lindsey v., 272  
 Colyer v. Finch, 361  
 Combe v. Hughes (14 Eq. 415), 315, 316  
   — v. Hughes (3 B. 127; 2 D. J. S. 657), 447  
 Comber's Trust, *Re*, 173  
 Comber v. Graham, 376  
 Comberbach, Bull v., 274, 372  
 Combes, Waite v., 145, 147  
 Comfort v. Brown, 372  
 Commissioners of Charitable Donations v. Cotter, 521  
 Comport v. Austen, 408  
 Compton, Right d. Compton v., 326  
   — Yates v., 355, 388  
 Conder, Smith v., 63, 597, 598  
 Conduitt v. Soane, 246  
 Coney, Smith v., 214  
 Congreve, Douglas v., 338  
   — v. Palmer, 256, 492, 496  
 Conmee, Tasffe v., 502  
 Connellan's Trust, *In re*, 508  
 Connolly, Beale v., 521  
 Connor, *In re*, 232, 234, 238, 240  
   — Jeffreys v., 533, 648  
 Conquest v. Conquest, 579  
 Conron v. Conron, 631  
 Consett v. Bell, 9  
 Constable v. Bull, 473, 484  
   — v. Constable, 135  
   — Henderson v., 567  
   — v. Steibel, 53  
 Cooch v. Walden, 97  
 Cood, *In bonis*, 67  
 Coogan v. Hayden, 268  
 Cook, Bone v., 604  
   — Boyes v., 179  
   — v. Cook, 243, 259, 318  
   — v. Dawson, 632, 633  
   — East v., 81  
   — Foster v., 627  
   — v. Gerard, 565  
   — Hogg v., 257  
   — Hudson v., 204  
   — Idle v., 323, 325, 537  
   — v. Jaggard, 159  
   — v. Lambert, 29  
   — Sibley v., 603  
 Cooke's Contract, *In re*, 356  
 Cooke, Barton v., 386  
   — Begley v., 394  
   — v. Blake, 350  
   — Cock v., 11  
   — v. Crawford, 75  
   — v. Cunliffe, 173, 174  
   — v. Dealey, 206  
   — Doe d. Everett v., 528, 529  
   — Gonne v., 527  
   — Illingworth v., 209  
   — Jameson v., 53  
   — v. Mirehouse, 530  
   — Perkins v., 636, 637  
   — v. Stationer's Company, 608  
   — Sutherland v., 111, 202  
   — v. Turner, 451, 452  
   — v. Wagster, 145  
 Cooksey, Douglas v., 628  
 Cookson v. Bingham, 319  
   — v. Hancock, 118

- Cookson v. Reay, 194  
 Coombe, A.-G. v., 294  
 Coombes, Charlton v., 455  
 Coombs, *In bonis*, 25  
 — v. Queen's Proctor, 18  
 Cooney v. Nicholls, 152  
 Cooper's Trusts, *In re*, 609  
 Cooper and Allen, *In re*, 359  
 Cooper v. Bockett, 26, 28, 33  
 — v. Cooper (L. R. 6 Ch. 15; *ib.*  
 7 H. L. 53), 81, 82, 84  
 — v. Cooper (29 B. 229), 418  
 — v. Cooper (6 Ir. Ch. 217), 456  
 — v. Cooper (1 K. & J. 658),  
 489  
 — v. Cooper (8 Ch. 813), 591  
 — Crause v., 499  
 — v. Day, 118  
 — v. Dennison, 276, 281  
 — Doe d. Cock v., 343  
 — v. Jarman, 205  
 — v. Kynock, 351  
 — v. Laroche, 430  
 — v. Macdonald (7 Ch. D. 288),  
 466, 469  
 — v. Macdonald (16 Eq. 258),  
 422, 506, 555, 596, 597  
 — v. Martin, 73, 204  
 — Moss v., 64, 65  
 — v. Pitcher, 568  
 — Playfair v., 637  
 — Streatfield v., 158  
 — v. Thornton, 386  
 — v. Wells, 467  
 — v. Woolfit, 151  
 — v. Wyatt, 464  
 Coore, Blagrove v., 122, 219  
 — v. Todd, 622  
 Coote v. Boyd, 116  
 — v. Coote, 641  
 — v. Gordon, 82  
 — v. Lowndes, 131  
 Cope, *In bonis*, 31  
 — *In re*, 364  
 Cope's Trusts, *In re*, 625  
 Cope, De La Warr, Earl, v., 548  
 — v. Henshaw, 213  
 — Johnson v., 253  
 — v. Wilmot, 584  
 Copland, Mann v., 110  
 Copley v. Copley, 588  
 Coponus, Curius v., 481  
 Copous, Cormack v., 422  
 Coppin v. Coppin, 603  
 — Dillon v., 9  
 — v. Fernyhough, 123  
 Coram, White v., 325  
 Corbally, Boyce v., 457  
 Corbet v. Corbet, 381, 618  
 — Williams v., 380  
 Corbett's Trusts, *Re*, 505, 506, 512  
 Corbett, Webber v., 212  
 Corby, *In bonis*, 52  
 — Thompson v., 294  
 Corbyn v. French, 304, 306, 604  
 Cordall's Case, 352  
 Cordell v. Noden, 109  
 Cordwainers, A.-G. v., 301  
 Cordwell's Estate, *In re*; White v.  
 Cordwell, 123  
 Cordwell, White v., 123  
 Corlass, *In re*, 249  
 Cormack v. Copous, 422  
 Cormick, Welply v., 378  
 Corneby v. Gibbons, 32  
 Corneek v. Wadman, 510  
 Cornforth, Boon v., 186  
 Cornick v. Pearce, 192  
 Corr v. Corr, 411  
 Corrie's Will, *Re*, 260, 261  
 Corser v. Cartwright, 361  
 Cort v. Winder, 520  
 Corthorn, Ogle v., 315, 316, 317  
 Cosby v. Ashdown, Lord, 85  
 — Bacon v., 532  
 Cosgrave, Kane v., 301  
 Cosser, *In bonis*, 53  
 Cosserat, Sharp v., 466  
 Costabadie v. Costabadie, 385  
 Cotter, Commissioners of Charitable  
 Donations v., 521  
 Cotton, *In bonis*, 26  
 — v. Cotton (2 B. 67), 283, 284  
 — v. Cotton (23 L. J. Ch. 489)  
 486  
 — Gurth v., 645  
 — v. Scarancke, 257  
 Cottrell, Cottrell v., 42  
 Coulthard, *In bonis*, 43  
 Coulthurst v. Carter, 495  
 — Stanley v., 561  
 Coulton, Booth v. (7 Jur. N. S. 207),  
 202  
 — Booth v. (5 Ch. 684), 638  
 Counden v. Clarke, 270  
 Court v. Buckland, 196  
 Courtenay v. Gallagher, 392  
 — v. Williams, 123  
 Courtoy v. Vincent, 143  
 Coussmaker, Kidney v. (12 Ves. 136),  
 84  
 — Kidney v. (1 Ves. jun. 436),  
 194  
 Coutts v. Acworth, 82  
 — Monroe v., 55  
 Coventry, Chichester, Lord, v., 589,  
 590  
 — v. Coventry, 246, 447, 625, 638  
 — Earl of, Hay v., 536  
 — v. Higgins, 139

- Coventry, Earl of, *Sheffield v.*, 478  
     — Earl of, *Tollemache v.*, 438  
 Coventry, Waring *v.*, 438  
     — *v.* Williams, 11  
 Cowan, Bush *v.*, 177  
     — Laing *v.*, 178, 180  
 Coward, *In bonis*, 18  
     — Lyon *v.*, 321  
 Cowcher, Reay *v.*, 55  
 Cowdery, Smith *v.*, 455  
 Cowley, Chaddock *v.*, 545  
     — *v.* Harstonge, 194  
     — Ryan *v.*, 341  
     — Earl, *v.* Wellealey, 645, 646  
 Cowling *v.* Cowling, 145  
 Cowman *v.* Harrison, 380  
 Cowper *v.* Mantell, 119, 121, 386,  
     604  
 Cowx *v.* Foster, 174  
 Cox, *In re*; *Cox v. Davie*, 307  
 Cox's Trusts, *In re*, 185, 644  
 Cox *v.* Bennett, 123  
     — Besant *v.*, 487  
     — Carbery *v.*, 297  
     — *v.* Cox, 648  
     — *v.* Davie, 307  
     — *v.* Fonblanque, 465  
     — *v.* Godsalve, 151  
     — Hale *v.*, 643  
     — *v.* Parker, 612  
     — *v.* Sutton, 553  
     — Wood *v.*, 383  
 Coxe, *v.* Bassett, 56  
     — *v.* Day, 366  
 Coyne *v.* Coyne, 204, 205  
 Cozens *v.* Crout, 94  
 Crabb, Dancer *v.*, 37, 38  
     — Goldney *v.*, 374  
 Crabtree, Smith *v.*, 582, 598  
 Cradock *v.* Cradock, 314  
     — Holmes *v.*, 404  
     — *v.* Owen, 612, 614  
 Crafton *v.* Frith, 293, 308  
 Cragg, Marchant *v.*, 218  
 Craig *v.* Wheeler, 202  
 Craight *v.* Lewin, 3, 5, 6  
 Cramp *v.* Playfoot, 585  
 Cranley *v.* Dixon, 567  
     — *v.* Hale, 615  
 Cranstoun, Doe d. Dunning *v.*, 99,  
     186  
 Cranswick *v.* Pearson, 395  
 Craufurd, Palmer *v.*, 388  
 Crause *v.* Cooper, 499  
 Craven, *In re*, 274  
     — *v.* Brady, 452, 455, 464, 610  
 Crawford, *In re*, 284  
 Crawford's Trust, 283  
 Crawford, Cooke *v.*, 75  
     — *v.* Trotter, 317  
 Crawford, Winterton *v.*, 505  
 Crawhall's Trusts, *In re*, 517  
 Crawley *v.* Crawley, 448, 647  
     — *v.* Dixon, 647  
 Crawshaw *v.* Crawshaw, 191  
 Crawshaw, Allin *v.*, 566  
 Creagh *v.* Creagh, 151  
     — *v.* Murphy, 380  
     — *v.* Willson, 455  
 Creaton *v.* Creaton, 352  
 Creber, Right *v.*, 272, 336  
 Creed *v.* Creed, 110, 621  
     — Girdlestone *v.*, 312  
     — Say *v.*, 275  
 Cregoe, Gully *v.*, 384  
 Cresswell, Caldwell *v.*, 400, 457  
     — *v.* Cheslyn, 190, 607, 619  
     — *v.* Cresswell, 94, 115, 309  
 Cresswick *v.* Gaakell, 521  
     — Reeves *v.*, 635  
 Crewe *v.* Deeken, 355  
     — Read, Sewell *v.*, 309  
 Crigan *v.* Baines, 484  
 Cringan, *In bonis*, 76  
 Cripps *v.* Woolcott, 508, 509  
 Crisford, Crowe *v.*, 203  
     — Beales *v.*, 147, 266, 314  
 Crisp, Doe d. Taylor *v.*, 451  
     — *v.* Walpole, 53  
 Crispe, Holmes *v.*, 139  
 Crispin, Sharpe *v.*, 4, 6  
 Critchett *v.* Taynton, 239  
 Crockett *v.* Crockett, 384  
 Croft, Day *v.*, 118  
     — *v.* Slee, 171  
 Crofts, Billson *v.*, 464  
     — *v.* Evetta, 293  
     — *v.* Middleton, 336  
 Croker's Estate, *In re*, 549  
 Croker *v.* Brady, 612, 613  
     — *v.* Hertford, Marquis of, 62  
 Croly *v.* Croly, 546  
     — *v.* Weld, 636  
 Crommelin *v.* Crommelin, 456  
 Crompe *v.* Barrow, 436, 476  
 Crompton *v.* Sale, 596  
 Crone *v.* Odell, 246, 250, 578  
 Crook *v.* Brooking, 64  
     — Hill *v.* (L. R. 6 H. L. 278), 231,  
         232, 233, 234  
     — Hill *v.* (24 W. R. 876; 3 Ch.  
         D. 773), 237, 238  
     — *v.* Whitley (7 D. M. & G. 490),  
         257  
     — *v.* Whitley (26 L. J. Ch. 350),  
         496  
 Crop, Read *v.*, 85  
 Cropton *v.* Davies, 349, 567  
 Crosbie, Evans *v.*, 153  
     — *v.* Macdoul, 44, 60



- Crobble, Wagstaff v., 479  
 Cross, Cunliffe v., 20  
   — Doe d. Cross v., 10  
   — Gibbens v., 57  
   — Henderson v., 460, 473  
   — v. Kennington, 633  
   — Leadbeater v., 405  
   — v. Maltby, 507  
 Crosse, Disney v., 175  
 Crossley v. Clare, 262  
 Crosthwaite v. Dean, 527  
   — Edmondson v., 644  
 Croughton's Trusts, *In re*, 470  
 Crout, Cozens v., 94  
 Crowder, Bromfield v., 403  
   — v. Clowes, 118  
   — v. Stone, 503, 515, 521, 544  
 Crowdy, Dutton v., 518  
 Crowe, Barnes v., 62  
   — v. Crisford, 203  
 Crowhurst, Godden v., 461  
 Crowther, Atherton v., 284, 286  
   — Marshall v., 646  
 Croxon, Morley v., 308  
 Crozier v. Crozier (3 D. & War. 373),  
   335, 345, 610  
   — v. Crozier (15 Eq. 282), 479  
   — v. Fisher, 511  
 Cruikshank v. Duffin, 364  
 Crump v. Playfoot, 310  
   — d. Woolley v. Norwood, 338  
 Cruse v. Barley, 196  
 Crutchley, Burrell v., 552  
 Cruttwell, Palmer v., 254  
 Cruttwell, Bickham v., 126, 642  
 Cruwys v. Colman, 267  
 Cubitt, Brady v., 57  
   — Worts v., 232  
 Cuddy, Lucas v., 258  
 Cuff v. Hall, 355  
 Culbertson v. Wood, 367  
 Cullen, Bent v., 392  
   — King v., 246, 520  
   — Roch v., 115, 117  
 Cullimore, Jones v., 546  
 Culsha v. Cheese, 602  
 Cumberland, Scott v., 620, 624, 626  
 Cundall, Doe v., 327  
 Cundy v. Medley, 55  
 Cunison, Popple v., 54  
 Cunliffe v. Branker, 244, 347, 348  
   — Cooke v., 173, 174  
   — v. Cross, 20  
 Cunningham v. Butler, 99  
   — Foot v., 398  
   — v. Ross, 121  
   — Smith v., 44  
 Cunningham's Settlement, *In re*, 431,  
   440  
 Cunynghame, Rose v., 55  
 Curcus v. Coponius, 481  
 Curnick v. Tucker, 384  
 Currall, Bowyer v., 502  
 Currie, Lake v., 177  
   — v. Pye, 117, 304  
 Curry, Jones v., 170  
   — v. Pile, 114  
 Cursbam v. Newland, 517  
 Curteis v. Kenrick, 172  
   — v. Wormald, 199  
 Curtis, Bishop v., 72  
   — v. Curtis, 22  
   — v. Fulbrook, 360  
   — v. Graham, 315  
   — v. Halton, 310  
   — v. Lukin, 443  
   — v. Price, 335, 351  
   — v. Rippon, 381  
 Curwen, Stonor v., 557  
 Curzon v. Curzon, 549  
   — Lord, Perfect v., 420  
   — Scarsdale, Lord, v., 552, 553  
   — Howe, Cardigan v., 540  
 Cusack v. Jellicoe, 140  
   — v. Rood, 280  
 Cust v. Middleton, 155  
 Custance, Holmes v., 207  
 Cutfield, Wardroper v., 406  
 Cuthbert v. Lempriere, 579  
 Cutto v. Gilbert, 42  
 Cutts, Hawley v., 102  
 DA COSTA v. Keir, 488  
 Dacre, Doe v., 477  
   — v. Patrickson, 128, 614, 639  
 Dadds, *In bonis*, 44  
 Dade, Casson v., 29  
 Daglie v. Fryer, 202  
 Daines, King's Proctor v., 10  
 Daintry v. Daintry, 563  
 Dakyns, Slark v., 440  
 Dalby v. Pullen, 72  
 Dale v. Hayes, 644  
   — Shepherdson v., 321  
 Dales, Snowdon v., 462  
 Dalhousie, Countess of, v. Macdonall,  
   4, 5  
 Dallas, Davidson v., 244  
   — Hamilton v. (38 L. T. N. S.  
   215), 3, 138  
   — Hamilton v. (1 Ch. D. 257), 6  
 Dallow, *In bonis*, 25, 60, 61, 63  
   — Evans v., 45  
 D'Almaine v. Moseley, 158  
 Dalrymple v. Hall, 219, 527  
   — Woodhouselee, Lord, v., 228  
 Dalton v. Hill, 420  
 Daly's Settlement, *In re*, 4  
 Daly, A.-G. v., 135

- Daly, Aubin *v.*, 388  
 Dalzell *v.* Welch, 259  
 Damer, Portarlington, Earl of, *v.*, 622, 630  
 Dancer *v.* Crabb, 37, 38  
 Dane's Estate, *In re*, 206  
 Daugerfield, Slater *v.*, 331, 345  
 Daniel *v.* Warren, 203  
 Daniell's Settlement Trusts, *In re*, 583  
 Daniell *v.* Daniell (3 De G. & S. 337), 242  
     — *v.* Daniell (6 Ves. 297), 508  
     — *v.* Gossett, 511  
     — Randall *v.*, 557  
 Dansey *v.* Griffiths, 324  
 Danvers, Doe d. Cook *v.*, 210  
 Da Pontes, Ford *v.*, 46  
 Darbison d. Long *v.* Beaumont, 270  
 Darbon *v.* Richards, 637  
 Darby, Purser *v.*, 169  
 Darell, Hales *v.*, 593  
 Darley *v.* Darley, 468  
     — *v.* Langworthy, 400, 577  
 Darlow *v.* Edwards, 216  
 Darrel *v.* Molesworth, 482  
 Dartmouth, Lord, Howe *v.*, 199, 200  
 Dashwood *v.* Peyton, 83  
 Da Silva, *In bonis*, 59, 66  
 Daunt, Gillman *v.*, 247  
 Davenhill *v.* Fletcher, 110  
 Davenport's Trusts, *Re*, 216, 226, 229  
 Davenport *v.* Bishopp, 489  
     — *v.* Coltman, 152, 198  
     — *v.* Davenport, 560, 561  
     — Elliott *v.*, 601, 602  
     — *v.* Hanbury, 259  
     — Holdsworth *v.*, 306  
     — Stow *v.*, 143  
 Daveron, Day *v.*, 152  
 Davers *v.* Dewes, 189, 615  
 Davey, Ward *v.*, 367  
 David's Trusts, 73, 176, 376  
 Davidson *v.* Dallas, 244  
 Davie, Cox *v.*, 307  
 Davie *v.* Stevens, 333  
 Davies, *In bonis*, 27  
     — *Ex parte*, 324, 543  
     — Trust, *In re*, 178, 181  
     — Will, *Re*, 241  
     — *v.* Ashford, 110  
     — A.-G. *v.*, 307, 309  
     — *v.* Bush, 621  
     — Cropton *v.*, 349, 567  
     — *v.* Davies, 45  
     — Evans *v.*, 232  
     — *v.* Fisher, 415, 416  
     — *v.* Fowler, 107  
     — *v.* Goodhew, 193  
     — Gough *v.*, 93  
     — Hale *v.*, 478  
 Davies *v.* Huguenin, 223, 225, 407  
     — Jones *v.*, 479  
     — La Roche *v.*, 493  
     — Lloyd *v.*, 488  
     — Lowe *v.*, 341  
     — *v.* Merceron, 540  
     — *v.* Morgan, 109  
     — Parrott *v.*, 414  
     — Powell *v.*, 219  
     — Richards *v.*, 532  
     — *v.* Thoms, 175  
     — *v.* Topp, 620  
     — Warren *v.*, 633  
     — *v.* Wattier, 636  
     — Wheateley *v.*, 142  
     — Wildes *v.*, 153, 288, 446, 448  
     — Young *v.*, 606  
 Davis, *In bonis*, 26, 29  
     — *v.* Angel, 455  
     — Bateman *v.*, 365  
     — Bennett *v.* (2 P. Wms. 316), 466  
     — *v.* Bennett (4 D. F. & J. 327), 253  
     — *v.* Boucher, 596  
     — *v.* Davis, 130  
     — Entwistle *v.*, 304, 305  
     — *v.* Gibbs, 165  
     — Godfrey *v.*, 226, 229, 246  
     — Gover *v.*, 183  
     — Gully *v.*, 165, 166, 167  
     — Harris *v.*, 191, 324, 331, 473, 535  
     — *v.* Kirk, 269  
     — Knight *v.*, 125  
     — *v.* Norton, 477  
     — Smith *v.*, 185  
 Davison & Torrens, *In re*, 458  
     — Gorbell *v.*, 276, 281  
 Davy, *In bonis*, 22  
     — Champney *v.*, 188, 298, 309, 312  
     — *v.* Smith, 29  
 Dawes' Trusts, *In re*, 493, 509  
 Dawes *v.* Bennett, 579  
     — Bland *v.*, 468  
     — Boddy *v.*, 141  
     — De Rochefort *v.*, 133  
     — *v.* Scott, 638  
 Dawkins *v.* Penrhyn, Lord, 429, 460  
 Dawson, Birch *v.*, 150  
     — *v.* Bourne, 316  
     — *v.* Clarke, 382, 614  
     — Cook *v.*, 632, 633  
     — *v.* Dawson, 597  
     — Dixon *v.*, 196  
     — *v.* Hearn, 389  
     — *v.* Oliver Massey, 451, 457  
     — *v.* Small (9 Ch. 651), 535  
     — *v.* Small (18 Eq. 114), 299, 585  
     — *v.* Thorne, 617  
 Day *v.* Barnard, 279  
     — Clerke *v.*, 342

- Day, Cooper v., 118  
   — Coxe v., 366  
   — v. Croft, 118  
   — v. Day (1 Dr. & Sm. 261), 125  
   — v. Day (14 W. R. 261), 130  
   — v. Day (1 R. 4 Eq. 385), 283  
   — v. Day (1 Dr. 569), 389  
   — v. Day (Kay, 703), 393, 530  
   — v. Dameron, 152  
   — v. Radcliffe, 523  
   — Right v., 324, 542  
   — v. Trig, 166  
 Dealey, Cooke v., 206  
 Dean, Booth v., 215  
   — Crosthwaite v., 527  
   — v. Gibson, 183  
   — v. Handley, 487  
   — James v., 122  
   — v. Test, 106  
 Dearle, *In bonis*, 25, 61  
 Dearsley, Elliott v., 634, 641  
 Death, Fenn v., 239  
 De Beaulieu, Hodgson v., 6  
 De Beauvoir v. De Beauvoir, 273  
 De Beauvoisin, Webb v., 618, 625  
 Debenham, Lane v., 355  
   — Morris v., 359  
 Debeze v. Mann, 597  
 De Bode, *In bonis*, 38  
 De Bonneval v. De Bonneval, 5, 6  
   — De Themmines v., 460  
 Deeken, Crewe v., 355  
 De Clifford, Donations, Commissioners  
   of, v., 431  
 Deerly v. Mazarine, 18  
 Deffis v. Goldschmidt, 248  
 Defries, Isaac v., 295  
 De Garagnol v. Liardet, 507  
 Deighton's Settled Estates, *In re*, 419  
 Delacherois v. Delacherois, 154  
 De La Mare, Rackham v., 482  
 Delamere, Owen v., 366  
 Delaney, A.-G. v., 293  
 De la Saussaye, *In bonis*, 2, 42, 44  
 De La Warr, Earl Cope v., 548  
 De Lisle v. Hodges, 113  
 De Livera, Dias v., 13, 218, 252  
 Delmare v. Robello, 207  
 De Lusi's Trusts, *In re*, 180, 181  
 De Manneville v. De Manneville, 91  
 De Mazay v. Pybus, 617  
 Dempsey v. Lawson, 42  
 Denby, *Re*, 288  
 Dendy, Heath v., 621  
 Dening, Baker v., 23  
 Denis's Trusts, *In re*, 261  
 Denison, Cooper v., 276  
   — King v., 382, 608, 615  
 Denn v. Gaskin, 325  
   — v. Gillott, 330  
 Denn, Roake v., 170  
   — v. Slater, 324  
   — d. Breddon v. Page, 536  
   — d. Gearing v. Shenton, 329  
   — d. Melior, Moor v., 326  
   — d. Webb v. Puckey, 344  
   — d. Wilkins v. Kemneys, 530  
 Denne, Walker v., 194, 612  
 Dennehy's Estate, *In re*, 443  
 Dennison, Hardcastle v., 329  
   — Cooper v., 281  
 Denny's Estate, *In re*, 537  
 Denny v. Barton, 10  
 Dent v. Allcroft, 307, 309  
   — Wilkinson v., 82, 86  
 Denton v. Manners, Lord J., 310  
   — Salisbury v., 263, 298, 308  
   — Stewart v., 108, 124  
   — Wedgwood v., 123, 450  
 Denysen v. Mostert, 13  
 De Pontes, Ford v., 575  
 Derby's Case, Lord, 476  
 Derby, Wallop v., 579  
 Dering, Monypenny v. (2 D. M. & G.  
   145), 425, 436, 477, 549, 550  
   — Monypenny v. (16 M. & W.  
   418), 441, 442  
   — Monypenny v. (7 Ha. 568),  
   569  
 De Rochefort v. Dawes, 133  
 De Roebuck v. Cloncurry, Lord, 144  
 De Rosaz, *In bonis*, 209  
 Desbarats, Chaudière Mining Com-  
   pany v., 93  
 Desbody v. Boyville, 490  
 De Serre v. Clarke, 423  
 Despard, Lemphier v., 184  
 De Tastet v. Le Tavernier, 464  
 De Themmines v. De Bonneval, 460  
 De Trafford v. Tempest, 188  
 Devall v. Dickens, 370  
 Devaynes, Land v., 122  
   — Reed v., 287  
 Devereux v. Bullock, 55  
   — Christian v., 283  
 Devez v. Pontet, 593  
 Devisme v. Mellish, 264  
 De Vitre, Jeffery v., 317  
 Devon, Duke of, Metham v., 231, 234,  
   238  
   — Ward v., 360  
 Devonshire, Duke of, Barker v., 633  
 Dew v. Clark, 14  
 Dewar v. Brooke, 410  
   — v. Maitland, 90  
 Dewell, Howorth v., 376  
 Dewes, Dauvers v., 189, 615  
   — Hall v., 357  
 Dewhurst, Price v., 3  
 De Windt v. De Windt, 314

- De Witte v. De Witte, 316  
 D'Eyncourt v. Gregory (1 Ch. D. 441), 458  
   — v. Gregory (34 B. 86), 550, 610  
 De Zichy Ferraris v. Hertford, Lord, 3  
 D'Huart v. Harkness, 1  
 Diaz v. De Livera, 13, 218, 252  
 Dibbin, Churchill v., 172  
 Dick v. Lacy, 254, 373  
   — v. Lambert, 615  
 Dicken v. Clarke, 404  
   — v. Edwards, 643  
 Dickens, Devall v., 370  
 Dickenson, Harman v., 504  
 Dickin v. Edwards, 110  
 Dickinson v. Stidolph, 41, 47  
   — v. Swatman, 38  
 Dickson, *In bonis*, 23  
 Dickson's Trust, 452  
 Dickson v. Robinson, 88  
   — Russell v., 115  
 Dighton, Tomlinson v., 73  
 Dilke, *In bonis*, 30  
 Dilley v. Matthews, 232  
 Dillon, Boswell v., 556  
   — v. Coppin, 9  
   — v. Harris, 529  
   — v. Reilly, 292, 298  
 Dimes v. Scott, 646  
 Dimond v. Bostock, 606  
 Dingle, Dingle v., 55  
 Dingwell v. Askew, 16, 120  
 Dinmore, *In bonis*, 27  
 Disney v. Crosse, 175  
 Dix v. Reed, 288  
 Dixon, *In bonis*, 273  
   — *In re*, 227  
 Dixon's Trusts, *In re*, 260  
 Dixon, Aitchison v., 7  
   — Arnold v., 206  
   — Baines v., 634  
   — v. Barkshire, 420  
   — v. Barlow, 312  
   — Cranley v., 647, 567  
   — v. Dawson, 196  
   — v. Dixon, 283, 284  
   — Moore v., 626  
   — Roadley v., 88  
   — v. Rowe, 464  
 Dixwell, Roberts v., 466  
 Dobson, *In bonis*, 12  
   — v. Banks, 190  
   — v. Bowness, 157, 158  
   — Sanderson v., 157  
   — v. Waterman, 102  
 Dod v. Dod, 560  
 Dodd, Maguire v., 9  
 Dodds v. Dodds, 340, 344  
   — Pedley v., 97  
 Dodgson's Trust, 523  
 Dodgson, Ives v., 574  
 Doddaley, Stocks v., 287, 370  
 Doe v. Allen, 325  
   — v. Barford, 56  
   — v. Barthrop, 349, 350  
   — v. Biggs, 347  
   — v. Bower, 97  
   — v. Brazier, 565  
   — v. Challis, 436, 477  
   — v. Chichester, 83  
   — v. Claridge, 352  
   — v. Clarke, 249  
   — v. Collins, 155  
   — v. Cundall, 327  
   — v. Dacre, 477  
   — v. Dring, 159  
   — v. Edlin, 57  
   — v. Frost, 324  
   — Girdlestone v., 493  
   — v. Harris, 44  
   — v. Heneage, 550  
   — v. Hicks, 557  
   — v. Homfray, 347  
   — v. Hopkinson, 404  
   — v. Hughes, 362, 363  
   — v. Laming, 338  
   — v. Lancashire, 56  
   — v. Lawson, 280, 282  
   — v. Luxton, 72  
   — v. Manifold, 29  
   — v. Martin, 165  
   — v. Palmer (16 Q. B. 747), 32, 33  
   — v. Parratt, 322  
   — v. Perkes, 44  
   — v. Plumtre, 278  
   — v. Rawding, 529  
   — v. Rucastle, 344  
   — v. Scarborough, Earl of, 551  
   — v. Shotton, 355  
   — v. Simpson, 352  
   — v. Sotheran, 320  
   — v. Thorley, 73  
   — v. Tomkinson, 73  
   — v. Wainwright, 504  
   — v. Webber, 532  
   — v. Woodhouse, 347  
   — v. Wright, 315  
   — d. Alostrop v. Alostrop, 330  
   — d. Allen v. Allen, 210  
   — d. Angell v. Angell, 271  
   — d. Ashley v. Baines, 325, 633  
   — d. Atkinson v. Fawcett, 325  
   — d. — v. Featherstone, 338  
   — d. Baldwin v. Rawding, 527  
   — d. Beach v. Jersey, Earl of, 96, 99  
   — d. Bean v. Halley, 564  
   — d. Blandford v. Applin, 343  
   — d. Blakiston v. Haslewood, 240

- Doe d. Blesard v. Simpson, 329, 532  
 — d. Blomfield v. Eyre, 478  
 — d. Borwell v. Abey, 395  
 — d. Bosnall v. Harvey, 338  
 — d. Browne v. Greening, 96  
 — d. Burden v. Burville, 571  
 — d. Burkitt v. Chapman, 158  
 — d. Burrin v. Chorlton, 333  
 — d. Cadogan v. Ewart, 348, 350  
 — d. Cannon v. Runcastle, 327  
 — d. Chandler v. Smith, 338  
 — d. Chattaway v. Smith, 266  
 — d. Chevalier v. Huthwaite, 218  
 — d. Chichester v. Oxenden, 96  
 — d. Chidgey v. Harris, 313  
 — d. Cholmondeley, Earl, v. Weatherley, 163  
 — d. Clarke v. Ludlam, 164  
 — d. Clift v. Birkhead, 518  
 — d. Cock v. Cooper, 343  
 — d. Comberbach v. Perryn, 536  
 — d. Compere v. Hicks, 350  
 — d. Conolly v. Vernon, 97  
 — d. Cook v. Danvers, 210  
 — d. Cooper v. Collis, 344  
 — d. Cross v. Cross, 10  
 — d. Davy v. Burnsall, 315, 332  
 — d. Dall v. Pigott, 97  
 — d. Dodson v. Grew, 344  
 — d. Dunning v. Cranstoun, 99, 166  
 — d. Elton v. Stenlake, 337, 442  
 — d. Evans v. Evans, 577  
 — d. Everett v. Cooke, 528, 529  
 — d. Fox, Marston v., 35  
 — d. Gains v. Rouse, 210  
 — d. Gallini v. Gallini, 564  
 — d. Garrod v. Garrod, 333  
 — d. Gigg v. Bradley, 333  
 — d. Gill v. Pearson, 459  
 — d. Gilman v. Elvey, 315, 332  
 — d. Gord v. Needs, 210, 211  
 — d. Gore v. Langton, 156  
 — d. Gorges v. Webb, 571  
 — d. Guest v. Bennett, 149  
 — d. Harris v. Greshed, 97  
 — d. Harris v. Taylor, 537  
 — d. Haw v. Earles, 159  
 — d. Herbert v. Thomas, 376  
 — d. Hickman v. Haslewood, 160  
 — d. Hiscocks v. Hiscocks, 213  
 — d. Hunt v. Moore, 403  
 — d. Hurrell v. Hurrell, 159  
 — d. Jearrod v. Banister, 323  
 — d. Jeff v. Robinson, 335  
 — d. Johnson v. Johnson, 542  
 — d. Keen v. Walbank, 351  
 — d. Kenrick v. Beauchlerk, Lord, 451  
 Doe d. Kimber v. Cafe, 351  
 — d. King v. Frost, 543  
 — d. Knott v. Lawton, 327  
 — d. Lees v. Ford, 478  
 — d. Lemprière v. Martin, 155  
 — d. Lifford v. Sparrow, 488, 511  
 — d. Lindsey v. Colyear, 272  
 — d. Littlewood v. Green, 319  
 — d. Lumley v. Scarborough, Earl of, 550  
 — d. Lyde v. Lyde, 539  
 — d. Moreton v. Fossick, 162, 163  
 — d. Morgan v. Morgan, 210, 212  
 — d. Nethercote v. Bartle, 163  
 — d. Newton v. Taylor, 97  
 — d. Noble v. Bolton, 347, 350  
 — d. Parkin v. Parkin, 97, 100  
 — d. Patrick v. Royle, 255  
 — d. Pall v. Jeyes, 163  
 — d. Phillips v. Aldridge, 296  
 — d. Phipps v. Mulgrave, Lord, 536  
 — d. Planner v. Scudamore, 403  
 — d. Player v. Nicholls, 349  
 — d. Pottow v. Fricker, 325  
 — d. Pratt v. Pratt, 160  
 — d. Reade v. Reade, 169  
 — d. Remow v. Ashley, 100  
 — d. Rew v. Lucraft, 539  
 — d. Roake v. Newell, 403  
 — d. Roylance v. Lightfoot, 168  
 — d. Sams v. Garlick, 326  
 — d. Shalcross v. Palmer, 47  
 — d. Shelley v. Edlin, 349  
 — d. Simpson v. Simpson, 532  
 — d. Smith v. Webber, 543  
 — d. Snape v. Neville, 579  
 — d. Spearing v. Buckner, 158  
 — d. Strong v. Goff, 329  
 — d. Taylor v. Crisp, 451  
 — d. Templeton v. Martin, 95  
 — d. Thomas v. Beynon, 208, 212  
 — d. Thorne v. Phillips, 326  
 — d. Todd v. Tnesbury, 538  
 — d. Tomkyns v. Willan, 351  
 — d. Tyrrell v. Lyford, 97  
 — d. Usher v. Jessop, 528  
 — d. Walls v. Langlands, 157  
 — d. Watson v. Shipphard, 477  
 — d. Wells v. Scott, 161  
 — d. Westlake v. Westlake, 211  
 — d. White v. Simpson, 352  
 — d. Williams v. Evans, 62  
 — d. Willis v. Martin, 423  
 — d. Winter v. Perratt (3 M. & Sc. 594), 271  
 — d. Winter v. Perratt (9 Cl. & F. 606), 431  
 — d. Woodall v. Woodall, 341  
 Dogget, Pawlet v., 543

- Doidge, Duke *v.*, 224  
 Dolan *v.* Macdermot, 290  
 Dolman, Adolph *v.*, 629  
   — Pearson *v.*, 390, 413, 414, 415, 460  
   — Soar *v.*, 39  
 Dolphin, Graves *v.*, 461  
   — *v.* Robins, 4, 5  
 Dommett *v.* Bedford, 462  
 Donville *v.* Baker, 122  
   — *v.* Taylor, 150  
 Donaldson, *In bonis* (3 P. & D. 45), 2  
   — *In bonis* (2 Curt. 386), 52  
 Donations, Commissioners of, *v.* De Clifford, 431  
 Donegan, Murphy *v.*, 281  
 Donnelly, Murphy *v.*, 160  
 Donmall, Best *v.*, 136  
 Donn *v.* Penny, 373  
 Donnellan *v.* O'Neill, 118, 296  
 Donoghue *v.* Brooke, 261  
 Donovan, Mahony *v.*, 183, 186  
   — *v.* Needham, 140  
 Doo *v.* Brabant, 482  
 Doody *v.* Higgins, 274, 275  
 Dooley *v.* Mahon, 209  
 Door *v.* Geary, 102  
 Doran, Bunbury *v.*, 327  
 Dorchester, Lord, *v.* Effingham, Earl of, 558  
 Dorian, Bishop, Robb *v.*, 296  
 Dorin *v.* Dorin, 229  
 Dornay *v.* Borradale, 630, 633  
 Dormer, Beauclerk, Lord, *v.*, 546  
   — *v.* Phillips, 270  
   — Sheldon *v.*, 634  
   — Williams *v.*, 4  
 Dorril, Routledge *v.*, 443  
 Dorset, Duke of, Woodcock *v.*, 421  
 Dorsett *v.* Dorsett, 466  
   — Hunt *v.*, 253  
 Dost Aly Khan, *In bonis*, 67  
 Dotterill, Gosden *v.*, 143, 144, 146  
 Douce, *In bonis*, 23, 24  
   — *v.* Torrington, Lady, 632  
 Doucet *v.* Geoghegan, 7  
 Douglas, Alexander *v.*, 268  
   — *v.* Andrews, 517, 518  
   — *v.* Chalmer, 485  
   — Churton *v.*, 151  
   — *v.* Congreve, 338  
   — *v.* Cooksey, 628  
   — *v.* Douglas, 3, 4  
   — *v.* Fellows, 209  
   — Hardwicke, Earl of, *v.*, 579  
   — Munroe *v.*, 5, 8  
   — *v.* Smith, 54  
   — Willes *v.* (10 B. 47), 254  
   — *v.* Willes (7 Ha. 318), 591  
 Douglass, Bowyer *v.*, 502  
 Douglass, O'Leary *v.*, 42  
 Doughty, Betts *v.*, 21, 69  
   — *v.* Bull, 193  
 Doutry *v.* Laver, 477  
 Dove, Bridgman *v.*, 630, 639  
 Dover *v.* Alexander, 227, 235  
   — Jackson *v.*, 418, 420  
 Dowdall *v.* McCartan, 130  
 Dowding *v.* Smith, 252  
 Dowling's Trusts, 490  
 Dowling *v.* Dowling, 568, 569  
   — Fream *v.*, 643  
   — *v.* Hudson, 632  
 Down *v.* Down, 99  
   — *v.* Worrall, 298  
 Downe, Viscount, *v.* Morris, 612  
 Downes, Bullock *v.*, 276, 277, 282  
 Downing, Bagnall *v.*, 10  
   — Grimson *v.*, 339  
   — Parker *v.*, 89  
 Dowse, *In re*; Dowse *v.* Glass, 593  
   — *v.* Glass, 593  
 Dowsett *v.* Sweet, 208, 210  
 Dowson *v.* Bell, 89  
   — *v.* Gaskoin, 145  
   — Stephenson *v.*, 108, 147  
 Doyle, Collins *v.*, 147  
 Doyley *v.* A.-G., 265, 298  
 Drake *v.* Drake, 213  
   — Eales *v.*, 109, 599, 602  
   — *v.* Martin, 183  
 Drakeford *v.* Drakeford, 509, 608  
 Drakeley's Estate, *Re*, 136, 394  
 Drant *v.* Vause, 204  
 Drapers, A.-G. *v.*, 300  
 Draycott *v.* Wood (8 L. T. N. S. 304), 394  
   — *v.* Wood (5 W. R. 158), 409  
 Drennan *v.* Andrew, 480  
 Drevon *v.* Drevon, 5  
 Drew *v.* Barry, 388  
   — Hanan *v.*, 539  
   — Walter *v.*, 543, 563  
   — Wood *v.*, 431  
 Drewett *v.* Pollard, 446  
 Drewitt, Mills *v.*, 636  
 Dring, Doe *v.*, 159  
 Drinkwater *v.* Falconer, 106, 121  
   — Martin *v.*, 116  
 Driver *v.* Driver, 584  
   — *v.* Frank, 219  
   — *v.* Thompson, 15  
   — White *v.*, 15  
 Drosier, Case *v.*, 432  
 Drummond, *In bonis*, 61, 67  
   — *v.* Parish, 52  
   — Tatham *v.* (2 H. & M. 262), 137  
   — Tatham *v.* (4 D. J. & S. 484), 308  
   — United States, President of, *v.*, 5

- Dryland, Howard *v.*, 641  
 Drysdale, Nevin *v.*, 596  
 Duane, *In bonis*, 20, 21  
 Dubber d. Trollope *v.* Trollope, 342  
 Duckmanton *v.* Duckmanton, 101  
 Duckworth, Aspinall *v.*, 287, 604, 606, 608  
 Duddy *v.* Gresham, 399, 453, 454, 456  
 Dudin, Whittell *v.*, 378  
 Duff, Gordon *v.*, 107  
 Duffield, Cogan *v.*, 559  
 — *v.* Duffield, 136, 401, 404  
 Duffin, Cruikshank *v.*, 364  
 Duffy, *In bonis*, 32  
 — Kelby *v.*, 162  
 Dufour *v.* Pereira, 13  
 Dugard, Manfield *v.*, 397, 402  
 Dugdale *v.* Dugdale (11 B. 402), 252  
 — *v.* Dugdale (14 Eq. 234), 620, 627  
 Duggan *v.* Kelly, 454, 490  
 Duggins, *Re*, 31  
 Du Hourmelin *v.* Sheddon, 93  
 Duke, *In re*; Hannah *v.* Duke, 508  
 — *v.* Doidge, 224  
 — Hannah *v.*, 508  
 Dummer *v.* Pitcher, 72, 86  
 Dunbar, Borton *v.*, 185  
 — Ferguson *v.*, 507  
 Duncan *v.* Bluett, 558  
 — *v.* Duncan, 118  
 — *v.* Watts, 621  
 — Wilkinson *v.* (23 B. 469), 199, 200, 647  
 — Wilkinson *v.* (30 B. 111), 437  
 Dundas *v.* Wolfe Murray, 141  
 Dundee, Magistrates of, *v.* Morris, 584, 585  
 Dungannon, Lord, Ker *v.*, 439  
 — *v.* Smith, 430, 438  
 Dunk *v.* Fenner, 338, 640  
 Dunlop, Moss *v.*, 280  
 Dunn, A.-G. *v.*, 5  
 — *v.* Bownas, 308  
 — Gainsford *v.*, 175, 633  
 — Green *v.*, 188  
 Dunnage *v.* White, 158  
 Dunne *v.* Dunne, 458  
 Dunnett, Rowbotham *v.*, 65  
 Dunnill's Will, *Re*, 561  
 Du Pasquier, Harris *v.*, 567  
 Durance, *In bonis*, 44, 66  
 Durand, Hart *v.*, 228  
 Durdant, Burchett *v.*, 269  
 Durham, Bishop of, Morice *v.*, 291, 293  
 — Lord, *v.* Wharton, 596  
 Durour *v.* Motteux, 196  
 Durrant *v.* Friend, 119, 226  
 Durston, Grosvenor *v.*, 72, 86, 146  
 Dugate, Robinson *v.*, 375  
 Dutton, *In bonis*, 43  
 — *Re*, 291, 430  
 — *v.* Crowdy, 518  
 — *v.* Hockenhull, 186  
 Dwarries, Shewell *v.*, 467  
 Dwyer, Anderson *v.*, 142  
 Dyer, Bragg *v.*, 53  
 Dyer, Grant *v.*, 450, 531  
 Dyer, Miles *v.*, 531  
 Dyose *v.* Dyose, 623  
 Dyott, Wakefield *v.*, 513  
 EADE *v.* Eade, 379, 381  
 Eager, M'Kenna *v.*, 345  
 Eagles *v.* Le Breton, 264  
 Eagleton, Tapley *v.*, 98, 101  
 Eales *v.* Cardigan, 395  
 — *v.* Drake, 109, 599, 602  
 Eames *v.* Anstee, 554  
 — Lambre *v.*, 267, 385  
 Earl, *In bonis*, 67  
 Earle *v.* Bellingham, 138, 637, 638  
 — Cadett *v.*, 150  
 — Tarbottom *v.*, 637  
 — *v.* Wilson, 237  
 Earles, Doe d. Haw *v.*, 159  
 Earlom *v.* Saunders, 194  
 Early *v.* Benbow, 114  
 — *v.* Early, 133  
 — *v.* Middleton, 114, 240  
 — Roffey *v.*, 111  
 — Townsend *v.*, 251  
 Earnley, Batten *v.*, 142  
 East *v.* Cook, 81  
 — *v.* Twyford, 341  
 Eastabrooke, Carr *v.*, 592  
 Easterson, Bryant *v.*, 472  
 Eastman *v.* Baker, 530  
 Eastwood *v.* Avizon, 539  
 — *v.* Lockwood, 221, 584  
 — Phillipps *v.*, 618  
 — *v.* Vinke, 592, 593  
 Easum *v.* Appleford, 180, 187  
 Eate, Castle *v.*, 397  
 Eaton *v.* Barker, 479  
 — *v.* Hewitt, 406  
 — Muskett *v.*, 404  
 — *v.* Watts, 381  
 Eavestaff *v.* Austin, 610  
 Eccard *v.* Brooke, 492  
 Eccles *v.* Birkett, 413  
 — *v.* Cheyne, 605  
 Eckersley *v.* Platt, 38, 46  
 Eckford, Haldane *v.*, 3  
 Eddel's Trusts, *In re*, 136, 245, 404, 475  
 Eddowes, *Re*, 570  
 — *v.* Eddowes, 244, 252  
 — Kirk *v.*, 596  
 Eden, Ellis *v.*, 102, 147

- Eden, Wilson v., 166  
 Edge v. Salisbury, 263, 295  
 Edgell, Sullivan v., 415  
 Edgeworth v. Edgeworth, 405  
   — v. Johnston, 596  
 Edlin, Doe v., 57  
   — Doe d. Shelley v., 349  
 Edmeades, Pearce v., 255, 395  
 Edmondson's Estate, *In re*, 408, 409, 416  
   — v. Crosthwaite, 644  
 Edmunds v. Fessey, 228  
   — v. Low, 592  
 Edward v. Astley, 33  
 Edwards v. Barnes, 157  
   — Blodwell v., 238  
   — Brownword v., 528, 529  
   — v. Champion, 318  
   — Darlow v., 216  
   — Dickin v., 110, 643  
   — v. Edwards, 486, 487  
   — Goodman v., 165  
   — v. Grove, 369  
   — v. Hall, 305, 306, 307, 308  
   — v. Hammond, 403  
   — v. Jones (33 B. 348), 321  
   — v. Jones (35 B. 474), 584  
   — Lysaght v., 169, 170  
   — Roberts v., 274  
   — v. Saloway, 603  
   — Secombe v., 529  
   — v. Tuck, 192, 446  
   — Vick v., 320  
   — v. West, 204  
 Eedle, Laxton v., 396  
 Eeles, *In bonis*, 38  
 Effingham, Earl of, Dorchester, Lord,  
   v., 558  
 Egerton v. Brownlow, Earl, 400, 451,  
   452, 556  
   — v. Massey, 161  
 Eidsforth v. Armstead, 361  
 Eisdale v. Hammeraley, 357  
 Ekins, Green v., 186  
   — v. Morris, 149  
 Elam, Ibbotson v., 134, 634  
 Elborne v. Goode, 448, 619  
 Elcock, Mapp v., 614  
 Elcum, Longmore v., 396  
 Eldridge, Armstrong v., 394  
 Elkin, Pinbury v., 543  
 Ellames, Bradish v., 186  
 Ellice, *In bonis*, 43  
   — Bulling v., 215  
 Ellicombe v. Gompertz, 541  
 Ellicott, Lindsay v., 279  
 Elliot v. Merryman, 364  
   — v. Montgomery, 631  
 Elliott v. Davenport, 601, 602  
   — v. Dearsley, 634, 641  
   — v. Elliott, 176, 247  
 Elliott, Stammers v., 123, 124  
 Ellis, *In bonis*, 29  
 Ellis's Trusts, *In re*, 470  
 Ellis, Barrymore v., 471  
   — v. Eden, 102, 147  
   — v. Ellis (23 W. R. 382), 379  
   — v. Ellis (1 Sch. & Lef. 1), 411  
   — v. Houston, 232  
   — Hughes v., 460  
   — Kelsey v., 395, 497  
   — Knight v., 374  
   — v. Lewis, 88  
   — v. Maxwell, 444, 448  
   — v. Selby, 183  
   — v. Smith, 24  
   — Thornton v., 199  
   — v. Walker, 109  
 Ellison v. Airey, 222  
   — Clavering v., 452, 458  
   — Lyddon v., 220  
   — v. Thomas, 225  
 Ellwood, Lyle v., 227  
 Elms v. Elms, 44  
 Elphinstone, Richardson v., 592, 593  
 Elsdon v. Elsdon, 54  
 Else v. Else, 486, 490  
 Elton v. Eason, 371  
   — v. Shepherd, 374  
 Elvey, Doe d. Gilman v., 315, 332  
 Elvin, Harrison v., 31  
 Elwes, Brudenell v., 435, 476  
   — v. Clouston, 113  
 Elwin v. Elwin, 528  
 Emerson v. Boville, 57  
 Emery's Estate, *Re*, 242  
 Emery v. England, 221  
 Emmett's Estate, *In re*; Emmett v.  
   Emmett, 248  
 Emmins v. Bradford, 280  
 Emperor v. Rolfe, 521  
 Empson, Hughes v., 365  
 Emuss v. Smith, 123, 166, 204  
 Engelhardt v. Engelhardt, 392  
 England, Emery v., 221  
   — Watson v., 514  
 English, *In bonis*, 11  
 Enis, Arnold v., 627  
 Eno v. Tatham, 131  
 Enohin v. Wylie, 3, 183  
 Enraght, Carthew v., 250, 570  
 Enthoven, Montefiore v., 464  
 Entwistle v. Davis, 304, 305  
 Eppe, Saunders v., 350  
 Errington, Bathurst v., 220, 221  
   — Carrick v., 610  
 Errol, Earl of, Carr v., 551, 552  
 Esmonde, Langdale v., 112  
 Eson, Elton v., 371  
 Espinasse v. Luffingham, 156  
 Essex, Earl of, Astley v. (6 Ch. 898), 142



- Essex, Earl of, Astley v. (18 Eq. 290),**  
 451, 461  
**Essex v. Clement, 514**  
**Etches v. Etches, 495**  
**Ettricke v. Ettricke, 320**  
**Eustace, *In bonis*, 42**  
 — *v. Robinson*, 559  
**Evan, Griffiths v., 266, 344, 381**  
**Evans v. Ball, 194**  
 — *v. Charles*, 287  
 — *v. Cockeram*, 127, 642  
 — *v. Crosbie*, 153  
 — *v. Dallow*, 45  
 — *v. Davis*, 232  
 — *Doe d. Evans v.*, 577  
 — *Doe d. Williams v.*, 62  
 — *v. Evans (23 B. 1)*, 170, 172  
 — *v. Evans (12 W. R. 508)*, 384  
 — *v. Evans (25 B. 81)*, 509  
 — *v. Evans (17 Sim. 106)*, 578,  
 618  
 — *v. Field (8 L. J. Ch. 264)*, 191  
 — *Field v. (15 Sim. 375)*, 471  
 — *Greenwood v.*, 635  
 — *v. Harris*, 248  
 — *v. Hellier*, 446, 448  
 — *Hughes v.*, 383  
 — *v. Jones*, 159, 189, 261  
 — *M'Clure v.*, 596  
 — *v. Massey*, 231, 237  
 — *Phillips v.*, 283, 285  
 — *Robinson v.*, 285  
 — *v. Rosser*, 454  
 — *v. Salt*, 273  
 — *v. Scott*, 407  
 — *Smith v.*, 24  
 — *v. Stratford*, 457  
 — *v. Tripp*, 102  
 — *v. Walker*, 392, 435  
 — *White v.*, 304, 617  
 — *Worthington v.*, 457  
 — *v. Wyatt*, 133  
 — *d. Brooke v. Astley*, 536  
 — *d. Weston v. Burtenshaw*, 270  
**Evanturel v. Evanturel, 451, 452**  
**Everall v. Browne, 184**  
**Everett v. Everett, 150**  
**Evers v. Challis, 475**  
**Evetta, Crofts v., 293**  
**Ewart, Doe d. Cadogan v., 348, 350**  
**Ewen v. Franklin, 30**  
**Ewens v. Addison, 457**  
**Ewing, *In bonis*, 68, 160**  
 — *v. Anderson*, 467  
 — *MacLae v.*, 53, 55  
**Exeter, Corporation of, A.-G. v., 294**  
**Eyden, Gibbons v., 132**  
**Eynon, *In bonis*, 30**  
**Eyre, Doe d. Blomfield v., 478**  
 — *Gower v.*, 645  
**Eyre v. Marsden, 446, 448, 507, 514,**  
 517, 619  
**Eyston, *Ex parte*; Throckmorton, *In***  
***re*, 464**  
**FADEN, Varlo v., 445, 644**  
**Fair, Acheson v., 376, 569**  
**Fairer v. Park, 112, 593**  
**Fairfield v. Bushell, 260**  
 — *v. Morgan*, 530  
**Fairland v. Percy, 366**  
**Fairtlough v. Johnstone, 82**  
**Falconer, Drinkwater v., 106, 121**  
**Falkland, Lady, Strode v., 123**  
**Falkner v. Butler, 187, 257**  
 — *v. Wynford, Lord*, 251  
**Fane, Wyndham v., 223**  
**Farhall v. Farhall, 364**  
**Farmer, Baker v., 113, 623**  
 — *Mills v. (1 Mer. 55)*, 299  
 — *v. Mills (4 Russ. 86)*, 623  
**Farn, Warburton v., 357**  
**Farncombe's Trusts, *In re*, 110, 606**  
**Farquhar, *In bonis*, 52**  
 — *v. Hadden*, 126  
**Farquharson v. Cave, 9**  
 — *v. Flower*, 620  
**Farr, Meredith v., 226, 231**  
 — *Smith v.*, 494  
**Farrand, Braddon v., 614**  
**Farrant, Brown v., 54**  
 — *v. Spencer*, 150  
**Farrer v. Barker, 418**  
 — *v. St. Catherine's Coll.*, 43, 213,  
 574, 620  
**Farrington v. Knightley, 615**  
 — *Maskell v.*, 630  
**Farrow v. Smith, 468**  
**Farthing v. Allen, 486**  
**Faulding's Trusts, 495**  
**Faulds v. Jackson, 27, 28, 29**  
**Faulkener v. Hollingsworth, 526**  
**Faversham, Mayor of, v. Ryder, 307**  
**Fawcett, Doe d. Atkinson v., 325**  
**Fay v. Fay, 324, 331**  
**Fazakerley v. Ford, 457, 549**  
 — *v. Gellibrand*, 591, 592  
**Feakes v. Standley, 542**  
**Fearnley, Parker v., 633**  
**Fearon v. Fearon, 83**  
**Featherstone, Doe d. Atkinson v.,**  
 388  
**Fell, Beaumont v., 208**  
 — *v. Biddulph*, 606  
 — *Trimmell v.*, 17  
**Fellows, Douglas v., 209**  
 — *Pet v.*, 140  
**Fells, *In re*; Andrews, *Ex parte*, 367**

- Feltham's Trusts, 207  
 Fenn v. Death, 239  
 Fennell, Hill v., 366  
 Fenner, Dunk v., 338, 640  
 Fenton v. Hawkins, 382, 609  
   — v. Wills, 619  
 Fenwick, *In bonis*, 35, 41  
   — Gael v., 129, 131  
   — v. Potts, 352  
   — Winn v., 251, 421  
 Ferers, Talbot v., 447  
 Ferguson v. Dunbar, 507  
   — Horridge v., 492  
 Fernyhough, Coppin v., 123  
 Ferrand v. Wilson, 439, 645  
 Ferraris, Countess, v. Hertford, Lord,  
   63, 64  
 Ferrick, Adams v., 125  
 Ferrier, Brine v., 114, 116  
   — v. Jay, 174  
 Farris, Tee v., 65  
 Fessey, Edmunds v., 229  
 Festing v. Allen (5 Ha. 575), 139, 140,  
   141  
   — v. Allen (12 M. & W. 279), 404  
   — v. Taylor, 143  
 Fetherston v. Fetherston, 329, 338,  
   341, 344  
 Fewkes, Barrs v., 289, 378  
 Finch, Jenner v., 29, 42  
 Field, *Re*, 148  
   — Evans v. (8 L. J. Ch. 264), 191  
   — v. Evans (15 Sim. 375), 471  
   — Fitzgerald v., 56, 186, 420  
   — Mayd v., 589, 624  
   — v. Mostyn, 594  
   — v. Peckett (9 W. R. 526), 150  
   — v. Peckett (29 B. 568), 194  
   — Pridie v., 143  
   — v. Seward, 599  
   — Wainman v., 190, 438  
   — Whitton v., 509  
   — Wray v., 115  
 Fielden v. Ashworth, 264, 277  
   — Firth v., 217  
 Fielding v. Preston, 111  
   — v. Walshaw, 9, 10  
 Fillingham v. Bromley, 452  
 Filliter, Pushman v., 380  
 Finch, *In re*; Abbiss v. Burney, 430,  
   549  
   — Colyer v., 361  
   — v. Finch (1 P. & D. 371), 47  
   — v. Finch (1 Ves. jun. 534), 588  
   — Harris v., 187  
   — v. Hattersley, 633  
   — Hatton v., 395  
   — v. Hollingsworth, 265  
   — v. Lane, 403  
   — Le Grice v., 108  
   — Finch, Nourse v., 615  
   — v. Squire, 304  
 Finden, Shallcross v., 632  
   — v. Stephens, 380  
 Findon v. Findon, 477  
   — Gough v., 9  
 Finlason v. Tatlock, 500  
 Finney's Estate, *Re*, 169  
 Finney v. Grice, 150  
 Firth v. Fielden, 217  
 Fischer v. Popham, 28  
 Fish v. A.-G., 585  
 Fisher v. Brierley, 118, 138  
   — Crozier v., 511  
   — Davies v., 415, 416  
   — Gibson v., 254, 256  
   — Hall v., 97, 100  
   — v. Hepburn, 183  
   — v. Moore, 511  
   — Morrell v. (4 Eq. 591), 97  
   — Morrell v. (4 De G. & Sm. 422),  
   625  
   — Thompson v., 557  
   — v. Webster, 316, 541  
   — Whiteway v., 577  
 Fisk v. A.-G., 299  
 Fitch v. Weber, 197, 611  
 Fitzgerald, *In re*; Adolph v. Dolman,  
   629  
   — A.-G. v., 7  
   — Cole v., 150, 186  
   — v. Field, 56, 186, 420  
   — v. Fitzgerald, 518  
   — Genery v., 137  
   — Roddy v., 336, 338, 341, 343,  
   570  
   — Smith v., 109, 574  
 Fitzhenry v. Bonner, 568  
 Fitzmaurice, Rochfort v., 557  
 Fitzroy, *In bonis*, 35  
   — v. Howard, 164  
 Fitzsimons v. Fitzsimons, 86  
 Fitzwilliams v. Kelly, 112, 125  
 Fladgate, Perkins v., 182, 242  
 Fleetwood, *In re*; Brewer, Sidgreaves  
   v., 64, 94, 183, 293  
   — Lindon v., 562  
 Fleming v. Brook, 151, 185  
   — v. Buchanan, 624  
   — v. Burrows, 182  
   — Ford v., 106, 109  
 Fletcher, Arkell v., 165  
   — A.-G. v., 320  
   — Davenhill v., 110  
   — v. Fletcher (4 Ha. 79), 9  
   — v. Fletcher (7 L. R. Ir. 40), 176  
   — v. Fletcher (3 D. F. & J. 775),  
   282  
   — v. Smiton, 159  
   — Wynne v., 438

- Flewitt, Wilmott v., 514, 517  
 Flight, Bizzey v., 63  
 Flinn v. Jenkins, 254  
   — Lee v., 546  
 Flint, Brocklehurst v., 600  
   — v. Hughes, 379  
   — v. Warren, 197  
 Flood, Lefroy v., 381  
 Flower v. Buller, 16  
   — Farquharson v., 620  
 Floyer v. Banks, 433  
 Foley v. Burnell, 553  
   — v. Gallagher, 502  
   — Lingon v., 634  
   — v. Parry, 381, 396  
 Follett v. Tyrer, 466  
 Fonblanque, Cox v., 465  
 Fonnereau v. Poyntz, 108, 623  
 Fooks, Pride v. (2 B. 430), 445  
   — Pride v. (3 De G. & J. 252),  
     540  
   — Slade v., 258  
 Foorde, Hayes d. Foorde v., 335, 337  
 Foot v. Cunningham, 398  
   — v. Stanton, 23  
 Foots, Hamilton v., 198  
   — Hodge v., 505  
 Forbes v. Ball, 175  
   — v. Forbes, 5, 7  
   — v. Gordon, 54  
   — v. Peacock, 360, 364  
   — v. Richardson, 637, 638  
 Force, Whiting v., 526  
 Ford, Angermann v., 287  
   — v. Batley, 389  
   — v. De Pontes, 46, 575  
   — Doe d. Lees v., 478  
   — Fazakerley v., 457, 549  
   — v. Fleming, 106, 109  
   — v. Ford, 163  
   — v. Fowler, 382  
   — v. Rawlins, 417  
   — Shaw v. (6 Ch. D. 1), 376  
   — Shaw v. (7 Ch. D. 669), 460  
 Fordham v. Speight, 384  
 Fordyce v. Bridges, 424  
 Foreman, Harrison v., 479  
 Forman, Thwaites v., 622  
 Forrest v. Prescott, 638  
   — v. Whiteway, 318  
 Forrester v. Leigh, 627  
   — v. Smith, 509, 510  
 Forristall, Scott v., 619  
 Forsbrook v. Forsbrook, 833, 442, 564  
 Forster v. Thompson, 632  
 Fortescue, Jordan v., 574  
 Forth v. Chapman, 541  
 Fossick, Doe d. Moreton v., 162, 163  
 Foster, *In bonis*, 76  
   — v. Cautley, 600  
 Foster v. Cook, 627  
   — Cowx v., 174  
   — Gotch v., 139, 410  
   — Halton v., 275  
   — v. Hayes, 538  
   — Honeywood v., 85  
   — v. Ley, 143  
   — Partridge v., 477  
   — v. Romney, Lord, 408  
   — v. Smith, 637, 638  
   — v. Wybrants, 261, 374  
 Fothergill, Bell v., 45  
 Foulds, Johnson v., 223, 410  
 Foulshaw, Matthews v., 242  
 Foulton v. Andrew, 20  
 Fountaine v. Tyler, 105, 108  
 Foudrin v. Gowdey, 593, 640  
 Fowler's Trust, 91  
 Fowler, Davies v., 107  
   — Ford v., 382  
   — v. Fowler (33 B. 616), 585  
   — v. Fowler (3 P. Wms. 353), 592  
   — Kelly v., 544  
   — v. Lightburne, 351  
   — Palmer v., 386  
   — v. Willoughby, 110  
 Fox's Will, *Re*, 253, 509  
 Fox, Castle v., 98, 103  
   — v. Collins, 211  
   — v. Fox (27 B. 301), 379  
   — v. Fox (19 Eq. 286), 413  
   — Hodgson v.; Hodgson, *In re*,  
     124  
   — Lanesborough, Lady, v., 432,  
     547  
   — v. Lowndes, 305  
   — v. Marston, 57  
   — Porter v., 436  
 Foxen v. Foxen, 623  
 Foxhall, Walsley v. (40 L. J. Ch.  
   28), 318  
   — Walsley v. (1 D. J. & S.  
     605), 394  
 Foxwell, King v., 5, 8  
 Frampton, Torret v., 319  
 Francis v. Clemon, 634  
   — v. Groves, 33  
 Franco, Torres v., 420  
 Frank, Driver v., 219  
   — v. Stovin, 344  
 Franklin, Ewen v., 30  
   — Herrick v., 372  
   — Houghton v., 142  
   — v. Lay, 332  
 Franks v. Brooker, 217  
   — Norreys v., 122, 196  
   — v. Price, 405, 539  
   — Sanders v., 370  
 Fraser, Abbott v., 297  
   — v. Byng, 116

- Fraser, Colvin v., 46  
   — v. Fraser, 415  
   — v. Piggott, 229  
   — Robertson v., 320  
 Frayne v. Taylor, 205  
 Fream v. Dowling, 643  
 Freeland v. Pearson, 73, 251, 602, 605  
 Freeman v. Bowen, 464  
   — Bremmer v., 3  
   — v. Chandos, Duke of, 163  
   — v. Freeman, 42  
   — v. Simpson, 138  
 Freke v. Carbery, Lord, 1, 424  
 Freman v. Whitbread, 646  
 French's Case, 40  
 French v. Caddell, 542  
   — Campbell v., 577  
   — Corbyn v., 304, 306, 604  
   — v. French, 316, 317  
   — Milltown, Earl of, v., 138  
 Frenchman, Turke v., 538  
 Frewen v. Hamilton, 396  
 Frewin v. Frewin, 205  
   — Jones v., 494  
 Fricker, Doe d. Pottow v., 325  
 Friend, Durrant v., 119, 226  
   — Pembroke v., 130, 131  
 Friswell v. Moore, 53  
 Frith and Osborne, *In re*, 354  
   — *In bonis*, 31  
   — Crafton v., 298, 308  
 Frobisher, Taylor v., 408  
 Froggatt v. Wardell, 316  
 Frogley v. Phillips, 258  
 Frogmorton v. Holiday, 327  
   — d. Robinson v. Wharrey, 330  
 Frost, Doe v., 324  
   — Doe d. King v., 543  
 Fruer v. Bouquet, 616  
 Fry, *Re*, 214  
   — v. Capper, 440  
   — v. Fry, 576  
   — Porter v., 451  
 Fryer, Allum v., 360  
   — Daglie v., 202  
   — Hensman v., 110, 620, 624,  
     627  
   — v. Morris, 121  
   — v. Rankin, 147  
   — Sowerby v., 645  
 Fulbrook, Curtis v., 360  
 Fulford, Hilliard v., 418  
 Fullalove, Occleston v., 233, 234, 236,  
   238  
 Fulleck v. Atkinson, 53  
 Fuller v. Chamier, 342  
   — Mann v., 118, 577  
   — Roxburgh v., 116  
 Fullerton v. Martin (22 L. J. Ch.  
   893), 158  
 Fullerton v. Martin (1 Dr. & Sm. 31),  
   647  
 Fulton, Casement v., 24, 29  
 Funnell, Grice v., 577  
 Furber, Hunt Foulston v., 389  
 Furlay v. Hyder, 647  
 Furneaux v. Rucker, 137  
 Furze, Yonge v., 126, 455  
 Fytton v. Rooth, 284  
  
 GABB v. Prendergast, 226, 227  
 Gadsden, Stephen v., 377  
 Gael v. Fenwick, 129, 131  
 Gaffee, *Re*, 470  
 Gainsford v. Dunn, 175  
 Gaisford, Jenkyns v., 23, 24  
 Gaitskell's Trust, *In re*, 519, 520, 522  
 Galbraith, Sullivan v., 392  
 Gale v. Gale, 121, 178  
   — Griffiths v., 605  
 Gallagher, Courtnay v., 392  
   — Foley v., 502  
 Galland v. Leonard, 487  
 Galley v. Barrington, 537  
 Gallimore v. Gill, 633  
   — Jennings v., 285, 286  
 Gallini, Doe d. Gallini v., 564  
   — v. Noble, 102  
 Gally, *In bonis*, 2  
 Galway, *Ld.*, Bodens v., 371  
 Gamboa's Trust, 273  
 Gane, Gillett v., 214  
 Ganesford v. Dunn, 633  
 Gann v. Gregory, 32, 33  
 Gard, Mitchell v., 22, 69  
 Garden v. Poulteney, 317  
 Gardiner's Estate, *In re*; Garratt v.  
   Weeks, 247  
 Gardiner, Boosey v., 477  
   — v. Jellicoe, 549, 551  
   — v. Slater, 455  
   — v. Stevens, 567  
   — Stringer v., 209  
 Gardner v. Barber, 396  
   — Boosey v., 374  
   — v. Hatton, 108, 109, 121  
   — Matthews v., 323, 532  
   — Pearce v., 355  
   — v. Sheldon, 564, 565  
 Garland, *Ex parte*, 366  
   — v. Beverley, 213, 269  
   — v. Brown, 434, 435  
   — v. Mead, 71, 164  
   — R. v., 71  
 Garlick, Doe d. Sams v., 326  
 Garman, Gray v., 497  
 Garnet, Pierson v., 381  
 Garnett v. Acton, 204  
   — Riley v., 351, 404

- Garratt v. Weeks, 247, 249  
 Garrett v. Cockerell, 545  
     — Niblock v., 216  
     — Pierson v., 384  
 Garrick v. Camden, Lord, 276  
 Garrod, Brooke v., 457  
     — Doe d. Garrod v., 383  
 Garth v. Baldwin, 371  
     — Colleton v., 122  
     — v. Meyrick, 210  
     — Phillips v., 277  
 Garvey v. Hibbert, 242  
 Garwood, Rickabe v., 252  
 Gascoyne, Green v., 448  
 Gaskell's Trusts, *Re*, 470  
 Gaskell, Creswick v., 521  
     — v. Harman, 525  
 Gaskin, Denn v., 325  
     — v. Rogers, 94, 153, 628  
 Gaskoin, Dowson v., 145  
 Gassiot, Ivison v., 185  
 Gatenby v. Morgan, 480  
 Gath v. Barton, 400  
 Gatti, *In bonis*, 2  
 Gaunt, Target v., 539  
 Gausden, *In bonis*, 29  
 Gawthorne, Goodale v., 136  
 Gaynon v. Wood, 594  
 Gaze, Gaze v., 28  
     — Love v., 382, 613  
 Geare, O'Dwyer v., 66, 67  
 Geary, Door v., 102  
 Geaves v. Price, 41  
 Geddes, Vaudry v., 414  
 Gee v. Audley, 544  
     — Carmichael v., 636  
     — v. Liddell (L. R. 2 Eq. 341), 502  
     — v. Liddell (35 B. 621), 592  
     — v. Manchester, Corporation of, 488, 489  
     — Measure v., 338  
 Geldard, Robinson v., 629  
 Geldart, Blamire v., 579  
 Gellatly, Brown v., 200, 646, 647  
 Gellibrand, Fazakerley v., 591, 592  
 Gendre v. Kent, 134  
 Genery v. Fitzgerald, 137  
 Genge, Hott v., 28  
 Gentili, *In bonis*, 1  
 Gentry, *In bonis*, 37  
 Geoghegan, Doucet v., 7  
 George, *In re*, 141  
 George, Andrewes v., 599  
     — King v., 183  
     — Rees v., 599  
     — Taylor v., 381  
 Gerard, Cook v., 565  
     — Soulle v., 531  
     — Walmsley v., 549  
 Gerrard v. Butler, 377  
 Getting, Burnie v., 147  
 Gibbens v. Cross, 57  
 Gibbes, Pickwick v., 139  
 Gibbins v. Eyden, 132  
 Gibbons, Berry v., 364  
     — Brackenbury v., 244, 475  
     — Corneby v., 32  
     — v. Caunt, 56  
     — v. Langdon, 518  
 Gibbs, Blake v., 151  
     — Davis v., 165  
     — v. Lawrence, 186  
     — v. Rumsey, 197, 289  
     — v. Tait, 373  
 Giblett, Child v., 490  
     — v. Hobson, 309  
 Gibson, *Re* (L. R. 2 Eq. 669), 103  
     — *Re* (2 J. & H. 656), 577, 607  
     — Baker v., 281  
     — Blackhall v., 328, 343, 345  
     — v. Bolt, 647  
     — v. Bott, 142  
     — Dean v., 183  
     — v. Fisher, 254, 256  
     — v. Gibson, 89  
     — v. Montfort, *Ld.*, 634  
 Giddings v. Giddings, 649  
 Gilbert, Milne v., 276  
 Gilbert, Burtenshaw v., 46, 58  
     — Cutto v., 42  
     — v. Lewis, 468  
     — Singleton v., 243  
 Gilbertson v. Gilbertson, 625, 641  
 Giles, *Re*, 152  
     — Barker v., 319  
     — Bignold v., 392  
     — v. Giles (1 Keen, 685), 215  
     — v. Giles (8 Sim. 360), 493, 496, 497  
     — Green v., 152, 535  
     — v. Horner, 358  
     — Melsom v., 516, 517, 554  
     — v. Warren, 36  
 Gill, *In bonis*, 60  
     — v. Bagshaw, 209  
     — v. Barrett, 422  
     — Gallimore v., 633  
     — Lightbourne v., 460  
     — v. Shelley, 228  
 Gillam v. Taylor, 295  
 Gillan v. Gillan, 299  
 Gillard, Bartlett v., 593  
 Guillaume v. Adderley, 107, 109  
 Gillespie v. Alexander, 116  
 Gillett, Castle v., 633  
     — v. Gane, 214  
     — v. Wray, 455  
 Gilliatt, Barksdale v., 143  
 Gillman's Estate, *In re*, 391  
 Gillman v. Daunt, 247

- Gillott, Denn *v.*, 330  
 Gillow *v.* Burne, 54  
     — Rammell *v.*, 520, 522  
 Gimblett *v.* Purton, 247  
 Giraud *v.* Hanbury, 615  
 Girdler, Capel *v.*, 122  
 Girdlestone *v.* Creed, 312  
     — *v.* Doe, 493  
 Gisborne *v.* Gisborne, 367  
     — Younghusband *v.*, 462  
 Gittings *v.* M'Dermott, 274  
 Gladding *v.* Yapp, 615  
 Gladstone, A.G. *v.*, 296  
     — Walsh *v.*, 292  
 Glanvill *v.* Glanvill, 137, 408  
 Glasbrook, Woodward *v.*, 531  
 Glascock, Shires *v.*, 29  
 Glass, Dowse *v.*, 593  
     — *v.* Richardson, 356  
 Glendening *v.* Glendening, 146  
 Gleggall, Earl of, Thynne, Lady, *v.*, 588, 589  
 Gloucester, Corporation of, Hope *v.*, 431  
     — Corporation of, *v.* Wood, 296, 378, 383  
 Glover, *In bonis*, 24  
     — *v.* Hartcup, 593  
     — Martin *v.*, 184, 276  
     — *v.* Monckton, 542  
     — Reeves *v.*, 54  
     — Tracy *v.*, 324  
 Glubb *v.* A.-G., 309  
 Glyn, Harding *v.*, 264, 265, 381, 384  
     — Morris *v.*, 305  
     — Spurway *v.*, 110, 137  
 Glynes, Munt *v.*, 559  
 Glynn *v.* Oglander, 10  
 Gobbe, Cole *v.*, 541  
 Goblet *v.* Beechey, 95  
 Goddard's Trusts, 421  
 Goddard, A.-G. *v.*, 306  
 Godden *v.* Crowhurst, 461  
 Godfrey *v.* Bryan, 322  
     — *v.* Davis, 226, 229, 246  
     — *v.* Godfrey, 381, 385  
     — *v.* Harden, 624  
     — Lord *v.*, 201  
 Godlee, Head *v.*, 198  
     — Reynolds *v.*, 199  
 Godolphin, Lt., Marlborough, Duke of, *v.*, 602  
 Godrich, Sheddon *v.*, 55, 90  
 Godsalue, Cox *v.*, 151  
 Godson, Holmes *v.*, 460  
 Goff, Doe d. Strong *v.*, 329  
 Going *v.* Hanlon, 327  
     — Quinhampton *v.*, 60, 597  
 Gold, Blague *v.*, 99  
 Goldie, Swabey *v.*, 255  
 Golding, Gray *v.*, 477  
 Golding *v.* Haverfield, 591  
 Goldney *v.* Crabb, 374  
 Golds *v.* Greenfield, 603  
 Goldschmidt, Deffiss *v.*, 248  
 Goldsmid, Lucas *v.*, 266  
     — Straus *v.*, 292  
 Goldwin, Chambers *v.*, 140  
 Golightly, Boydell *v.*, 273  
 Gompertz, Ellicombe *v.*, 541  
     — *v.* Gompertz, 378  
 Gonne *v.* Cooke, 527  
 Gooch *v.* Gooch, 248, 252, 435  
 Good *v.* Good, 329  
 Goodacre, Arden *v.*, 462  
     — *v.* Smith, 21  
 Goodale *v.* Gawthorne, 136  
 Goodban, Lemage *v.*, 41, 42  
 Goodbun, Clifton *v.*, 229  
 Goode, Elborne *v.*, 448, 619  
 Goodenough, Rogers *v.*, 43, 60  
     — *v.* Tremamondo, 202  
 Goodfellow, Banks *v.*, 14  
     — *v.* Burchett, 588  
     — *v.* Goodfellow, 240  
 Goodhew, Davies *v.*, 193  
 Goodinge *v.* Goodinge, 263  
 Goodlad *v.* Barnett, 102  
 Goodlake, Wood *v.*, 53  
 Goodman's Trusts, *In re*, 227  
 Goodman *v.* Edwards, 165  
     — *v.* Goodman (2 Lee 109), 54  
     — *v.* Goodman (1 De G. & Sm. 695), 518  
 Goodright *v.* Jones, 477  
     — *v.* White, 270  
     — d. Revell *v.* Parker, 397  
 Goodtitle *v.* Billington, 474  
     — *v.* Whitby, 350  
     — d. Bailey *v.* Pugh, 270  
     — d. Daniel *v.* Miles, 163  
     — d. Hayward *v.* Whitby, 402  
     — d. Radford *v.* Southern, 99  
     — d. Sweet *v.* Herring, 341  
 Goodwin's Trusts, *In re*, 236  
 Goodwin *v.* Lee, 127  
     — Perkins *v.*, 232  
 Goodyar, *In bonis*, 183  
 Goodyer, Charge *v.*, 259  
 Goodynge *v.* Goodynge, 295  
 Gould *v.* Teague, 145, 204  
 Goulden, Smallman *v.*, 109  
 Goose, Holdsworth *v.*, 357  
 Gorbell *v.* Davison, 276, 281  
 Gordon *v.* Adolphus, 399, 406  
     — *v.* Anderson, 115  
     — *v.* Atkinson, 319  
     — *v.* Bowden, 636  
     — Coote *v.*, 82  
     — *v.* Duff, 107  
     — Forbes *v.*, 54

- Gordon v. Gordon (1 Mer. 142), 237, 238  
   — v. Gordon (L. R. 5 H. L. 254), 478  
   — Norcott v., 621  
   — v. Reay, Lord, 63  
   — v. Whieldon, 218  
 Gorst v. Lowndes, 444  
 Gorsuch, Rowland v., 262  
 Goaden v. Dotterill, 143, 144, 146  
 Goslett, Bower v., 473  
 Gosling v. Carter, 362  
   — Christie v., 439, 556, 558  
   — v. Gosling, 447, 461  
   — v. Townshend, 487, 489  
 Gossage v. Taylor, 330  
 Gossett, Daniell v., 511  
 Gotch v. Foster, 139, 410  
 Gott, Allan v., 640  
   — Heptinstall v., 608  
 Goudge, Lane v., 413, 416  
 Gough v. Bult, 386, 584  
   — v. Davies, 93  
   — v. Findon, 9  
 Goulbourne, Nightingale v., 290  
 Gould v. Gould, 611  
   — Knight v., 607  
   — v. Lake, 32  
 Gouldbury, Huddleston v., 148  
 Goulder v. Camm, 468, 470  
 Gover v. Davis, 183  
 Gowan v. Broughton, 619, 620  
 Gowdey, Fourdrin v., 593, 640  
 Gower v. Eyre, 645  
   — Jenkins v., 276  
 Gowland, Langford v., 296  
 Gowling v. Thompson (19 L. T. N. S. 242), 256  
   — v. Thompson (11 Eq. 366), 496  
 Grace, Falkner v., 640  
   — Webb v., 399  
 Grady, Harding v., 631  
 Graftey v. Humpage, 286  
 Graham, *In bonis*, 41, 76  
   — Comber v., 376  
   — Curtis v., 315  
   — Hanson v., 412  
   — v. Lee, 463  
   — v. Paternoster, 306  
   — Pearce v., 605  
   — Pownall v., 439  
   — Taylor v., 421  
   — Windham v., 224  
 Grainger, Christ's Hospital v., 424  
   — Slingsby v., 99, 100, 147  
 Grange, Hill v., 155  
 Granger, Kendall v., 291, 298  
 Granmer's Case, 592  
 Grant, Barnes v., 381, 382  
   — Barton v., 386  
   — v. Bridger, 575  
 Grant v. Dyer, 450, 531  
   — v. Grant, 208, 212  
   — Hodges v., 111, 152, 321  
   — v. Lynam, 264, 267  
   — Stoddart v., 42  
   — Thompson v., 169  
   — v. Winbolt, 393  
 Granville v. Beaufort, 616  
 Grassett, Hollingsworth v., 287  
 Gratix v. Chambers, 390  
 Gratwicke, *Re*, 421  
 Gratwicke's Trusts, 176  
 Gravenor v. Hallum, 197  
   — v. Watkins, 328, 578  
 Graves' Minors, *In re*, 204  
   — v. Dolphin, 461  
   — v. Graves, 632  
   — v. Hicks, 558  
   — Palmer v., 632  
   — v. Waters, 573  
 Gray, Bateman v., 248, 252  
   — Butler v., 176, 378, 570  
   — v. Garman, 497  
   — v. Golding, 477  
   — v. Limerick, Earl of, 223  
   — v. Minnethorpe, 641  
   — Robinson v., 327  
   — v. Siggers, 201  
 Grayburn v. Clarkson, 365  
 Graydon v. Hicks, 450, 457  
 Grayson, *In re*, 280  
   — v. Atkinson (2 Ves. sen. 459), 24  
   — v. Atkinson (1 Wils. 333), 160  
 Great v. Greated, 131, 460, 483, 530  
 Greathead, Doe d. Harris v., 97  
 Greater, *In bonis*, 25  
 Greatrex, Adney v., 257  
 Greaves v. Price, 76  
   — v. Simpson, 342  
 Green's Estate, *Re*, 482  
 Green, Band v., 612  
   — v. Barrow, 485  
   — v. Britten (42 L. J. Ch. 187), 82, 310  
   — v. Britten (1 D. J. & S. 649), 203, 468  
   — Carter v., 310  
   — Doe d. Littlewood v., 319  
   — v. Dunn, 188  
   — v. Ekins, 136  
   — v. Gascoyne, 448  
   — v. Giles, 152, 535  
   — v. Green, 535  
   — v. Harvey, 530  
   — Haslewood v., 112  
   — v. Jackson, 196  
   — Jones v., 119  
   — Lane v., 243  
   — v. Marsden, 380, 468  
   — v. Pertwee, 190

- Green, Piggott *r.*, 287  
   — *v.* Skipworth, 54  
   — Stewart *v.*, 291  
   — Symes *r.*, 14  
   — *v.* Symonds, 122, 151  
   — *v.* Tribe (9 Ch. D. 231), 44, 60  
   — *v.* Tribe (27 W. R. 39), 136, 576  
 Greenbank, Hearle *v.*, 90, 140, 466  
 Greene *v.* Greene (I. R. 3 Eq. 90, 629), 380  
   — *v.* Greene (4 Mad. 148), 641  
   — *v.* Ward, 568  
 Greener, Mannox *v.*, 156, 327, 630  
 Greenfield, Golds *v.*, 603  
 Greenhalgh *v.* Bates, 519  
 Greenhill, A.-G. *r.*, 431, 459  
   — Smith *v.*, 554  
 Greening, Doe d. Browne *v.*, 96  
   — Stone *v.*, 97, 166  
 Greenough, Barracrough *v.*, 69  
 Greenway *v.* Greenway, 192, 331, 535  
 Greenwich Hospital Improvement Act, *Re The*, 158  
 Greenwood's Trusts, *In re*, 277  
 Greenwood, Barker *v.*, 347  
   — *v.* Evans, 635  
   — *v.* Greenwood, 582  
   — *v.* Percy, 508  
   — *v.* Roberts, 437  
   — *v.* Rothwell, 345  
   — *v.* Verdon, 534, 544  
 Greese, Richardson *r.*, 594  
 Greet *v.* Greet, 412  
 Greetham *v.* Colton, 631  
 Gregory's Will, 207, 213  
 Gregory, Alt *v.*, 255, 394  
   — Aston *v.*, 139  
   — Badger *v.*, 504  
   — D'Eyncourt *v.* (1 Ch. D. 441), 458  
   — D'Eyncourt *v.* (34 B. 36), 550, 610  
   — Gann *v.*, 32, 33  
   — *v.* Henderson, 348  
   — *v.* Queen's Proctor, 24, 31  
   — *v.* Smith, 268  
   — Wildbore *v.*, 172, 177  
 Gregson's Trust Estate, *In re*, 508  
   — Trusts, *Re*, 209  
 Gregson, Clayton *r.*, 35  
 Greig *v.* Martin, 209  
 Grenfell, Paget *v.*, 590  
 Gresham, Duddy *v.*, 399, 453, 454, 456  
   — Wharton *v.*, 335  
 Gresley *v.* Mousley, 72  
 Gretton *v.* Haward, 338  
 Greville *v.* Browne, 638, 641  
   — *v.* Tylee, 33  
 Grew, Doe d. Dodson *r.*, 344  
 Grey *v.* Pearson, 528, 529, 531  
   — Pickersgill *v.*, 245  
   — Ward *v.*, 153, 315  
 Grice, Finney *v.*, 150  
   — *v.* Funnell, 577  
 Grier, *In re*, 560, 561  
 Grieve *v.* Grieve, 334  
 Grieves *v.* Rawley, 257  
 Grievason *v.* Kinsopp, 250  
 Griffin, Thompson *v.*, 369  
 Griffith, *In bonis*, 41  
   — *In re*, 135  
   — *v.* Blunt, 408  
   — Carr *v.*, 135  
   — *v.* Jones, 295  
   — *v.* Pownall, 437  
   — *v.* Pruen, 288  
   — *v.* Rogers, 616  
 Griffiths, Bean *v.*, 452  
   — Dansey *v.*, 324  
   — *v.* Evan, 266, 344, 381  
   — *v.* Gale, 605  
   — *v.* Griffiths, 30  
   — *v.* Hamilton, 614, 616  
   — *v.* Vere, 445  
 Grimshaw's Trusts, *In re*, 414, 415  
 Grimshawe *v.* Pickup, 531  
 Grimson *v.* Downing, 339  
 Grimwood, Harrison *v.*, 415, 416, 417  
 Grindell, Machin *v.*, 53  
 Grindle, Blaiklock *v.*, 90  
 Grindley, Tavernor *v.*, 225, 611  
 Grissell *v.* Swinhoe, 84  
 Grogan, McCormick *v.*, 65  
 Gronow, Morgan *v.*, 440  
 Groom *v.* Thomas, 15  
 Groombridge, Browne *v.*, 119, 240, 618, 625  
 Grosvenor *v.* Durston, 72, 86, 146  
 Grote, A.-G. *r.*, 107  
 Grove's Trusts, *Re* (1 Giff. 74), 392  
   — Trusts (3 Giff. 575), 418  
 Grove, Edwards *v.*, 369  
   — Gullan *v.*, 46  
   — Hillersden *v.*, 289  
   — May *v.*, 147  
   — Young *v.*, 313, 398  
 Groves, Francis *v.*, 33  
   — Shailer *v.*, 253  
   — *v.* Wright, 472  
 Gryll's Trust, *Re*, 223, 283, 285, 549  
 Guardhouse *v.* Blackburn, 21, 22  
 Gude *v.* Mumford, 143  
   — *v.* Worthington, 386  
 Guedalla, M. ntefiore *r.*, 595  
 Guest *v.* Willasey, 62  
 Guilleward, Rickett *v.*, 513  
 Gullan, *In bonis*, 45, 46  
   — *v.* Grove, 46



Gullan, Stevenson v., 255, 508, 509  
 Gulliford, Parsons v., 496  
 Gulliver v. Wickett, 486  
 Gully v. Cregoe, 384  
     — v. Davis, 165, 166, 167  
 Gummo v. Howes, 341, 511  
 Gundry v. Pinniger, 275, 283  
 Gurner, Harman v., 98  
 Gurney v. Gurney, 94  
     — Hemming v., 116  
 Gurth v. Cotton, 645  
 Gutteridge, Phillips v., 637, 638  
 Guy v. Sharp, 115  
 Gwillim v. Gwillim, 28  
 Gwynne v. Berry, 324, 542  
 Gyett v. Williams, 622, 634  
  
**HABERGHAM v. Ridebalgh**, 241, 493,  
     494, 497  
     — v. Vincent, 10, 64  
 Hackman, Rochford v., 462, 463  
 Haddelsey v. Adams, 350, 502  
 Hadden, Farquhar v., 126  
 Hadow v. Hadow, 385  
 Hadwen v. Hadwen, 557  
 Hagen's Trusts, *In re*, 507  
 Hagger v. Payne, 246  
 Haig v. Swiney, 374  
 Hake, King v., 421  
 Haldane v. Eckford, 3  
 Hale v. Beck, 568  
     — v. Cox, 643  
     — Cranley v., 615  
     — r. Hale, 438  
     — Maddy v., 648  
     — v. Pew, 433, 442  
     — Phipps v., 30  
     — Stevens v., 565, 566  
     — v. Tokelove, 43, 60  
     — Webster v., 104, 105, 138  
 Hales, Bridges v., 79  
     — v. Darell, 593  
     — v. Margerum, 376  
     — Stummvoll v., 241  
     — Synge v., 321  
 Haley v. Bannister (23 B. 386), 118  
     — v. Bannister (4 Mad. 275), 444  
 Halfhead v. Shepherd, 570  
 Halford, Hodgson v., 435, 436, 440,  
     452, 454  
     — v. Stains, 446, 448  
 Hall, *In bonis*, 33  
 Hall's Charity, *Re*, 298  
     — Will, *Re*, 472  
 Hall v. A.-G. (2 Jarm. on Wills, 114),  
     295  
     — A.-G. v. (9 H. 647), 308

Hall, Baker v., 608  
     — Cuff v., 355  
     — Dalrymple v., 219, 527  
     — v. Dewes, 357  
     — Edwards v., 305, 306, 307,  
         308  
     — v. Fisher, 97, 100  
     — r. Hall, 21  
     — v. Hewer, 222  
     — v. Hill, 88, 114, 590  
     — Horton v., 636  
     — v. Leitch, 574  
     — Line v., 441  
     — Margetson v., 500  
     — v. May, 75  
     — Price v., 244, 403, 404, 475  
     — v. Robertson, 218  
     — v. Warren, 15  
     — v. Waterhouse, 16  
     — Wheate v., 359  
     — v. Woolley, 495  
 Halley, Doe d. Bean v., 564  
 Halifax v. Wilson, 523, 524  
 Halliley, Stammers v., 622  
 Halliwell, *In bonis*, 43  
 Hallum, Gravenor v., 197  
 Hallyburton, *In bonis*, 1  
 Halpin, *In bonis*, 10  
 Halsey, Peck v., 584  
 Halton, Curtis v., 310  
     — v. Foster, 275  
 Ham's Trusts, *In re*, 283, 620  
 Hamerton, Hawkins v., 506  
 Hamilton v. Buckmaster, 157, 158  
     — v. Dallas (1 Ch. D. 257), 6  
     — v. Dallas (38 L. T. N. S. 215),  
         3, 138  
     — v. Foote, 198  
     — Frewen v., 396  
     — Griffiths v., 614, 616  
     — Mayor of, v. Hodsdon, 157  
     — Jackson v., 584, 624  
     — Johnstone v., 612, 614  
     — v. Mills, 273  
     — v. West, 329, 340, 344  
 Hammersley, Eisdale v., 357  
 Hammond, *In bonis*, 28  
     — Browne v., 406, 605  
     — Edwards v., 403  
     — Hutcheson v., 195, 196, 456,  
         601  
     — Joslin v., 484  
     — Kelly v., 229  
     — v. Neame, 385  
 Hampshire v. Peirce, 243  
 Hampson, Thackeray v., 490, 531  
 Hampton v. Holman, 434, 441, 442  
 Hanan v. Drew, 539  
 Hanbury, Baker v., 604  
     — Davenport v., 259

- Hanbury, Giraud v., 615  
   — v. Hanbury, 588  
   — v. Spooner, 287  
 Hanby v. Roberts, 628  
 Hance v. Truwhitt, 89  
 Hancock, Blagrove v., 403  
   — Cookson v., 118  
   — Jones d. Henry v., 584  
 Hancox v. Abbey, 127, 639, 642, 643  
 Hand v. North, 320  
 Handley, Dean v., 487  
   — Wade Gery v., 444, 610  
 Hane, Hastings v., 146  
 Hankey, Tatnall v., 1  
 Hanley, Miller v., 552  
 Hanlon, Going v., 327  
 Hanna v. Bell, 240  
 Hannaford v. Hannaford, 571  
 Hannah v. Duke, 508  
 Hannam, Ryall v., 209  
   — v. Simms, 494  
 Hanning, Trent v., 346  
 Hanrott, Wombwell v., 600  
 Hanson v. Graham, 412  
 Hansard, Yockney v., 114  
 Harbin v. Masterman, 447  
   — Stocker v., 56, 640  
   — Tytherleigh v., 495  
 Harcourt, Ainslie v., 658  
   — v. Morgan, 101  
 Hardacre v. Nash, 152  
 Hardaker v. Stead, 619, 620  
 Hardcastle v. Dennison, 329  
   — v. Hardcastle, 413  
 Harden, Beckett v., 56, 577  
   — Godfrey v., 624  
 Harding, Barry v., 125, 148  
   — Campbell v., 540  
   — v. Glyn, 264, 265, 381, 384  
   — v. Grady, 631  
   — v. Harding, 130  
   — Roche v., 621  
 Hardman, Upton v., 535  
 Hardwick v. Hardwick, 99  
   — Ring v., 440  
   — v. Thruston, 603  
   — Walker v., 639  
 Hardwicke, Earl of, v. Douglas, 579  
 Hardy, *In re*; Week v. Barwick, 621,  
   623  
   — Lockhart v., 386, 639  
 Hare v. Hare, 554  
   — v. Pryce, 186  
   — v. Westropp, 579  
 Harewood, Earl of, Taylor v., 548  
 Harford v. Browning, 288  
   — Miles v., 436  
 Hargreaves v. Pennington, 118, 576  
 Harkness, D'Huart v., 1  
 Harland v. Trigg, 380  
 Harley, A.-G. v. (4 *Mad.* 263), 116  
   — A.-G. v. (5 *Mad.* 321), 303, 304  
   — v. Moon, 113  
 Harloe v. Harloe, 625  
 Harman v. Dickenson, 504  
   — Gaakell v., 525  
   — v. Gurner, 98  
   — Hope v., 9  
   — Lugar v., 241, 370  
   — Offen v., 365  
 Harmony, The, 5  
 Harmood v. Oglander, 620  
 Harper v. Munday, 126, 635  
   — Stringer v., 133, 625  
 Harpur, Hedges v., 261, 393, 533, 543  
 Harries' Trust, *In re*, 113, 187  
 Harrington's Trust, *Re*, 18, 93  
 Harrington, Countess of, v. Atherton,  
   199, 647  
   — v. Harrington, 439, 554  
 Harris, *In bonis* (3 *Sw. & T.* 485),  
   39, 45  
   — *In bonis* (2 *P. & D.* 83), 68  
   — *In re*; Jacobson v. Queen Anne's  
   Bounty, Governors of, 306  
 Harris's Trust, *Re*, 219, 221  
 Harris, Amson v., 252  
   — Ball v. (4 *M. & Cr.* 264), 361  
   — Ball v. (8 *Sim.* 485), 631  
   — v. Bedford, 54  
   — v. Berrall, 36  
   — Bird v., 382, 398  
   — v. Davis, 191, 324, 331, 473,  
   535  
   — Dillon v., 529  
   — Doe v., 44  
   — Doe d. Chidgey v., 313  
   — v. Du Pasquier, 567  
   — Evans v., 248  
   — v. Finch, 137  
   — v. Harris (1 *R.* 3 *Eq.* 610),  
   189, 574  
   — v. Harris (32 *B.* 333), 649  
   — v. Lloyd, 226, 244, 247  
   — Millar v., 79  
   — v. Newton, 275, 378  
   — v. Poyner, 202  
   — Smith v., 24  
   — v. Watkins, 633  
   — Whitehorne v., 263  
 Harrison, *In bonis*, 28  
   — *Re*, 320  
 Harrison's Estate, *In re* (3 *L. R.* *Ir.*  
   114), 261  
   — Estate, *In re* (*L. R.* 5 *Ch.* 408),  
   327, 567  
   — v. Asher, 119  
   — Bide v., 147  
   — Buchanan v., 269  
   — Caldecott v., 258

- Harrison, Cockayne v.**, 472  
 — **Cowman v.**, 380  
 — **v. Elvin**, 31  
 — **v. Foreman**, 479  
 — **v. Grimwood**, 415, 416, 417  
 — **v. Harrison** (28 B. 21), 281  
 — **v. Harrison** (1 Keen 765), 89  
 — **v. Harrison** (1 R. 10 Eq. 290), 240  
 — **v. Harrison** (1 R. & M. 71), 242, 303, 304  
 — **v. Harrison** (2 H. & M. 237), 613  
 — **v. Harrison** (8 Ch. 342), 624  
 — **Haverгал v.**, 607  
 — **v. Jackson**, 108, 120  
 — **Miles v.**, 625, 629  
 — **v. Naylor**, 557  
 — **v. Round**, 549  
 — **v. Rowley**, 287  
**Harrowby, Ltd., Johnson v.**, 118  
**Hartonge, Cowley v.**, 194  
**Hart's Trusts**, 407, 412, 413, 453  
**Hart, Chapman v.**, 122, 144, 151  
 — **Coates v.**, 528, 572  
 — **v. Durand**, 228  
 — **v. Middlehurst**, 560  
 — **v. Talk**, 582  
 — **v. Tribe**, 385  
**Hartcup, Glover v.**, 593  
**Harter v. Harter**, 22  
 — **Moss v.**, 177  
**Hartford v. Power**, 468  
**Hartland v. Murrell**, 632, 633  
**Hartley, In bonis**, 41  
**Hartley's Trusts, In re**, 216  
**Hartley v. Hurle**, 165, 641  
 — **Mortimer v.**, 278, 531  
 — **v. Tribber**, 228  
**Harton v. Harton**, 347, 351  
**Hartopp v. Hartopp**, 595  
**Hartshorne v. Nicholson**, 308  
**Harvey's Estate, In re; Godfrey v. Harden**, 624  
**Harvey, Doe d. Bosnall v.**, 338  
 — **Green v.**, 530  
 — **Harvey v.** (23 W. R. 478), 42, 172  
 — **v. Harvey** (2 P. W. 21), 140  
 — **v. Harvey** (32 B. 441), 151  
 — **v. Harvey** (5 B. 134), 203  
 — **v. Harvey** (3 Jur. 949), 422  
 — **v. Palmer**, 123  
 — **Pratt v.**, 307  
 — **Quain v.**, 631  
 — **v. Stacey**, 174, 246, 606  
 — **v. Towell**, 373  
**Harwood v. Baker**, 14  
 — **Scott v.**, 244  
**Haselfoot, Paske v.**, 73  
**Hasker v. Sutton**, 530  
**Hackett Smith's Trusts, In re**, 499  
**Haslam, O'Connor v.**, 630  
**Haslewood, Doe d. Blakiston v.**, 240  
 — **Doe d. Hickman v.**, 160  
 — **v. Green**, 112  
**Hasluck v. Pedley**, 135  
**Hasell v. Hawkins**, 594  
**Hasela, Ledward v.**, 458  
**Hastilow v. Stobie**, 20  
**Hastings v. Hane**, 146  
**Haswell v. Haswell**, 463  
**Hatchell, Morgan v.**, 78  
**Hatfield v. Minet**, 595  
**Hattatt, Hattatt v.**, 11, 54  
**Hattersley, Finch v.**, 633  
**Hatton v. Finch**, 395  
 — **Gardner v.**, 108, 109, 121  
 — **Hooley v.**, 114, 115  
 — **v. May**, 389  
**Haughton v. Haughton**, 454  
**Haverfield, Golding v.**, 591  
**Haverгал v. Harrison**, 607  
**Havers, Smith v.**, 396  
**Haviland, Nichols v.**, 276, 603  
**Haward, Gretton v.**, 338  
 — **v. James**, 522  
**Hawe, Attree v.**, 305, 306  
 — **Beckett v.**, 28  
**Hawes, Cole v.**, 381  
 — **v. Hawes** (14 Ch. D. 614), 241  
 — **v. Hawes** (1 Ves. sen. 13), 581  
**Hawkes v. Hawkes**, 33  
 — **v. Hubbuck**, 470  
 — **Nicholls v.**, 390  
**Hawkins, Ex parte**, 205  
**Hawkins' Trust**, 287, 307  
**Hawkins v. Allen**, 307  
 — **Fenton v.**, 382, 609  
 — **v. Hamerton**, 506  
 — **Hasell v.**, 594  
 — **v. Hawkins**, 125, 611, 629  
**Hawks v. Longridge**, 189  
**Hawksley v. Barrow**, 15  
**Hawksworth v. Hawksworth** (6 Ch. 539), 79  
 — **v. Hawksworth** (27 B. 1), 157, 581  
**Hawley v. Cutts**, 102  
 — **Thornton v.**, 198  
**Hawthorn v. Shelden**, 178, 624  
**Hay, Buckton v.**, 431  
 — **v. Coventry, Earl of**, 536  
 — **Lilley v.**, 295  
**Hayden, Coogan v.**, 268  
 — **v. Willshire**, 261  
**Haydon v. Wood**, 360  
**Hayes, In bonis**, 52  
**Hayes' Will, Re**, 488  
**Hayes v. Catley**, 181  
 — **Dale v.**, 644

- Hayes, Foster v., 538  
   — v. Hayes, 434  
   — Watson v., 382, 414  
   — d. Foorde v. Foorde, 335, 337  
 Haygarth, Taylor v., 612, 614  
 Hayne, Power v., 389  
 Hayne's Trusts, *Re*, 487  
 Haynes v. Haynes (1 Dr. & Sm. 426), 205  
   — v. Haynes (3 D. M. & G. 590), 143, 622, 636  
   — v. Hill, 62  
   — v. Mico, 593  
 Hayter v. Trego, 296, 299  
   — v. Tucker, 305  
 Haythorne, Williams v., 409, 420  
 Hayton's Trusts, *Re*, 569  
 Hayward v. James, 523  
   — Page v., 398  
   — v. Pile, 648  
 Head v. Godlee, 198  
   — v. Randall, 261, 321  
 Headfort, Marquis of, Vaughan v., 315  
 Healy v. Healy, 211  
 Heap, Schofield v., 595  
 Heape, Sabin v., 361  
 Heardson v. Williamson, 352  
 Hearing, Webb v., 324, 405  
 Hearle v. Greenbank, 90, 140, 466  
 Hearn v. Allen, 155  
   — v. Baker, 502, 508  
   — Dawson v., 389  
 Hearne v. Wigginton, 182  
 Heasman v. Pearce, 260, 322, 422, 431, 495, 499  
 Heath v. Chapman, 293  
   — v. Dendy, 621  
   — v. Lewis, 399, 454  
   — Oke v., 187, 604  
   — v. Perry, 139  
   — v. Samson, 6  
   — v. Weston, 153  
   — v. Wickham, 469  
 Haddon, Whitelock v., 259, 272  
 Hedge's Trust Estate, *In re*, 598  
 Hedges v. Harpur, 261, 393, 533, 543  
 Hedgman, *In re*; Morley v. Croxon, 308  
 Hedley's Trusts, *In re*, 567  
 Hegarty v. King, 20  
 Heiron, Carveth v., 279  
 Hellicar, Powell v., 9  
 Hellier, Evans v., 448  
 Helliwell, Pearson v., 636  
 Helsington, Wasse v., 633  
 Helyar v. Helyar, 57  
   — Trethewy v., 287, 610, 624  
 Hember, Parfitt v., 441, 442  
 Hemming v. Gurney, 116  
 Henderson, *Re*, 284  
   — v. Constable, 567  
   — v. Cross, 460, 473  
   — Gregory v., 348  
   — v. Kennicott, 521  
   — Lawlor v., 264  
   — Tuckey v., 115  
   — Vaux v., 274, 283  
 Heneage v. Andover, Lord, 635  
   — Doe v., 550  
   — Meredith v., 380, 381  
 Henfrey v. Henfrey, 42  
 Henley, Bartholomew v., 10  
   — Jones v., 215  
   — Lord, Noel v., 642  
 Hennessey v. Bray, 323  
 Henniker, Wythe v., 627, 628  
 Henrlon v. Bonham, 396  
 Henry, Clark v., 487, 488, 489  
   — v. Henry, 86, 639  
   — Oppenheim v., 247  
 Henshaw, *Re*, 288, 289  
   — v. Atkinson, 309  
   — Cope v., 213  
 Hensley v. Ickeringill, 181  
   — v. Wills, 395  
 Hensman v. Fryer, 110, 620, 624, 627  
 Henvell v. Whitaker, 633  
 Hepburn, Fisher v., 183  
   — v. Skirving, 162  
 Heptinstall v. Gott, 608  
 Hepworth v. Hill, 130  
   — v. Taylor, 529  
 Herbert's Trusts, 228  
 Herbert v. Herbert, 52  
   — Jerningham v., 584  
   — v. Reid, 216  
   — Sinnett v., 297, 308, 312  
   — Twist v., 506  
   — v. Webster, 437  
 Hereford, Bishop of, v. Adams, 294  
   — v. Ravenhill, 194, 198  
 Herne, *In bonis*, 54, 55  
   — Reeves v., 455  
 Heron, Poole v., 110  
   — Stokes v., 391  
 Herrick v. Franklin, 372  
   — Woodhouse v., 343  
   — White v., 471  
 Herring v. Barrow, 74  
   — Goodtitle d. Sweet v., 341  
   — Howes v., 493  
 Hertford, Marquis of, Croker v., 62  
   — Lord, De Zichy Ferraris v., 8  
   — Lord, Ferraris, Countess v., 63, 64  
   — Marquis of, v. Lowther, 151, 182  
   — Marquis of, Southampton, Lord, v., 432, 433

- Hervey-Bathurst v. Stanley, 221, 223  
 Hervey v. M'Laughlin, 485  
 Heseltine v. Heseltine, 122  
 Hetherington v. Oakman, 422  
 Hewer, Hall v., 222  
 Hewatson, Paul v., 74  
   — v. Todhunter, 284  
 Hewett v. Snare, 618  
 Hewitt, Eaton v., 406  
   — v. Jardine, 596  
 Heywood v. Heywood, 527  
 Hibbert, Garvey v., 242  
 Hibbert v. Hibbert (15 Eq. 372), 264  
   — v. Hibbert (3 Mer. 687), 380  
 Hibblethwait v. Cartwright, 240  
 Hixon v. Hixon, 155  
 Hiccocks, Atkins v., 411  
 Hickens v. Hickens, 623  
 Hickman v. Upsall, 636  
 Hicks, Doe v., 557  
   — Doe d. Compere v., 350  
   — Graves v., 558  
   — Graydon v., 450, 457  
   — v. Rosa, 391, 392  
   — v. Sallitt, 154  
 Hide, Meade v., 639  
   — Morley v., 355  
 Higgins, Coventry v., 139  
   — Doody v., 274, 275  
 Higginson v. Barneby, 560, 561  
 Higgs, Brown v., 265, 570  
 Higham v. Baker, 100  
 Hight, White v., 533  
 Hilhouse, Thornton v., 633  
 Hill, *In bonis* (1 Rob. 276), 52  
   — *In bonis* (2 P. & D. 89), 67  
 Hill's Trusts, *In re* (16 Ch. D. 173), 304  
   — *In re* (12 Eq. 302), 488  
 Hill, Ayrey v., 15  
   — v. Chapman, 244, 246  
   — v. Crook (L. R. 6 H. L. 278), 231, 232, 233, 234  
   — v. Crook (3 Ch. D. 773), 237, 238  
   — Dalton v., 420  
   — v. Fennell, 366  
   — v. Grange, 155  
   — Hall v., 88, 114, 590  
   — Haynes v., 62  
   — Hepworth v., 130  
   — v. Hill (11 Jur. N. S. 806), 112  
   — v. Hill (6 Sim. 136), 561  
   — Hull v., 150  
   — v. Jones (37 L. J. Ch. 465), 118  
   — v. Jones (2 W. R. 657), 308  
   — Lacey v., 87, 164  
   — v. London, Bishop of, 126  
   — Marshall v., 532  
 Hill, Merry v., 410, 411, 414  
   — v. Rattey, 327, 392  
   — Rose d. Vere v., 323, 510  
   — White v., 532  
 Hillas v. Hillas, 152  
 Hillersden v. Grove, 289  
 Hilliard, Clowes v., 282  
   — v. Fulford, 418  
 Hillier, Evans v., 446  
 Hilla, Palin v., 286  
   — v. Wirley, 604  
 Hillyar, Bolitho v., 485, 500  
   — Burt v., 492, 498  
   — Burt v., 266  
 Hilton, Clarke v., 382, 609  
   — v. Hilton, 599  
 Hinchcliffe v. Hinchcliffe (2 Dr. & S. 96), 117  
   — v. Hinchcliffe (3 Ves. 516), 588  
   — v. Westwood, 283, 284  
 Hind v. Selby, 203  
 Hindle, *In re*; Megson v. Hindle, 233  
   — v. Taylor (5 D. M. & G. 577), 555  
   — v. Taylor (20 B. 109), 637  
 Hindmarch, *In bonis*, 32  
 Hindmarsh v. Charlton, 26, 30  
 Hindson v. Wetherill, 21  
 Hineale v. Ickeringill, 181  
 Hines v. Hines, 203  
 Hinxman, A.-G. v., 310  
   — Mackworth v., 439, 553  
   — v. Paynder, 381  
 Hipkins, Blount v., 641  
 Hiscocks, Doe d. Hiscocks v., 213  
 Hiscox, Willis v., 342, 459  
 Hitchins v. Basset, 41  
 Hixon v. Oliver, 375  
 Hoare v. Osborne (12 W. R. 897, 661), 180, 607  
   — v. Osborne (L. R. 1 Eq. 585), 291, 292, 298  
   — Playford v., 350  
 Hobart v. Suffolk, Countess of, 382  
 Hobbs v. Knight, 45  
   — Shum v., 410  
 Hobgen v. Neale, 259, 262, 493, 494, 499, 500, 501  
 Hobson v. Blackburn, 12, 101, 165  
   — Giblett v., 309  
   — Pattenden v., 274  
 Hoby v. Hoby, 54  
 Hockenhull, Dutton v., 186  
 Hockley v. Mawbey, 332  
 Hodge, Barkenshaw v., 114  
   — v. Foote, 505  
 Hodgens, Read v., 293  
 Hodges, *In re*; Davey v. Ward, 367  
 Hodges' Trusts, 451  
 Hodges, De Lisle v., 113

- Hodges v. Grant, 111, 152, 321  
   — Morris v., 648  
   — v. Peacock, 117  
 Hodgeson v. Bussey, 371  
 Hodgkinson, Parkin v., 519  
 Hodgson, *In re*; Hodgson v. Fox, 124  
 Hodgson's Trusts, 321  
 Hodgson, A.-G. v., 306, 308  
   — Bective, Countess of, v., 444  
   — Bective, Earl of, v., 137, 198  
   — Bowman v., 23  
   — v. Clarke, 213  
   — v. De Beaucherc, 6  
   — v. Fox, 124  
   — v. Halford, 435, 436, 440, 452, 454  
   — v. Jex, 184  
   — v. Smithson, 479  
 Hodgkinson v. Quinn, 361  
 Hodsdon, Hamilton, Mayor of, v., 157  
 Hogan v. Jackson, 160  
 Hogg, Clarke v., 369  
   — v. Cook, 257  
   — v. Jones, 552  
   — v. Lashley, 10  
 Holden v. Ramabottom, 150  
   — Stokes v., 93  
 Holder v. Preston, 356  
 Holderness, Lady, v. Carmarthen, Lord, 388  
   — Coard v., 158  
 Holdich v. Holdich, 89  
   — v. Goose, 357  
 Holdsworth v. Davenport, 306  
   — v. Goose, 357  
 Hole v. Davies, 478  
 Holford v. Wood, 114, 618  
 Holgate v. Jennings, 203  
   — Martin v., 260, 495, 498  
   — Priestley v., 400  
 Holiday, Frogmorton v., 327  
 Holland v. Allsop, 504  
   — v. Wood, 246, 500  
   — Yardley v., 123  
 Hollier v. Burne, 648  
 Hollingsworth, Faulkner v., 526  
   — Finch v., 265  
   — v. Grassett, 287  
 Hollins, Sorresby v., 307  
 Hollis v. Allan, 644  
 Hollmrake v. Lister, 458  
 Holloway v. Clarke, 56  
   — v. Clarkson, 376  
   — v. Holloway, 281, 282  
   — Marshall v., 432  
   — Martelli v., 439, 553  
   — v. Radcliffe, 277, 284  
 Holman, Hampton v., 434, 441, 442  
 Holmdon, Lomax v., 220  
 Holme, Banks v., 431, 547  
   — Coldwell v., 297  
 Holmedon, Lomax v., 397  
 Holmes, *In re*, 555  
   — Avison v., 464  
   — v. Cradock, 404  
   — v. Crispe, 139  
   — v. Custance, 207  
   — v. Godson, 460  
   — v. Holmes, 596  
   — v. Penny, 463  
   — Plunket v., 336  
   — v. Prescott, 136, 404  
   — v. Sayer Milward, 165  
   — Swan v., 86  
   — Waterhouse v., 307  
 Holmeadale, Viscount, Sackville-West v., 550, 556, 558, 560  
 Holt v. Sindrey, 227, 230, 234  
 Holtzappfell, Tapster v., 57  
 Home v. Pillans, 490  
 Homer v. Homer, 97  
 Homfray, Doe v., 347  
 Hone v. Medcraft, 123  
 Honnor, Webb v., 175  
 Honeywood, *In bonis*, 22  
   — Bennett v., 264, 302  
   — v. Foster, 85  
   — v. Honeywood, 645, 646  
   — Jeffery v., 315, 317, 334  
 Hood v. Barrington, Lord, 68  
   — v. Clapham, 201  
   — v. Oglander, 459  
   — Poulet, Earl, v., 149  
   — Remnant v., 407  
 Hook, Atlee v., 18  
 Hooker, Ledger v., 115  
 Hooley v. Hatton, 114, 115  
 Hooper, *Ex parte*, 532, 539  
   — Bate v., 365  
   — Masters v., 264  
   — Nichols v., 543  
   — v. Strutton, 860  
   — Tagart v., 43  
 Hope, Browne v., 603  
   — v. Gloucester, Corporation of, 431  
   — v. Harman, 9  
   — v. Hope (10 B. 581), 9  
   — v. Hope (5 Giff. 13), 173  
   — v. International Financial Society, 452  
   — v. Liddell, 169, 364  
   — v. Potter, 582  
   — d. Brown v. Taylor, 152  
 Hopkins' Trusts, *In re* (9 Ch. D. 131), 261  
 Hopkins' Trust, *In re* (18 Eq. 696), 644  
 Hopkins' Trusts, *Re* (2 H. & M. 411), 273, 510  
 Hopkins v. Abbott, 148

- Hopkins, Blount v., 125  
   — v. Hopkins, 136, 475  
   — Nelson v., 167  
   — v. Phillips, 308  
   — v. Ramage, 72  
 Hopkinson, Doe v., 404  
   — Surtees v., 582  
 Hoppe, Morrison v., 158  
 Hopwood v. Hopwood, 121  
 Horder v. Suffolk, Earl of, 302  
 Hordern, Laker v., 228, 230  
 Horn, Almack v., 240  
   — Audley v., 316, 317, 335  
   — v. Coleman, 277  
 Hornby, *Re*, 607  
   — Shrewsbury v., 292  
 Horncastle, Titchfield, Marquis of, v., 160  
 Horne v. Barton, 561  
 Horner, Giles v., 358  
 Hornsby, Simpson v., 565  
 Horridge v. Ferguson, 492  
 Horsefield, Ashton v., 160  
 Horsepool v. Watson, 284  
 Horsfall, Smith v., 260  
 Horsfall, *Re*, 168  
 Horsford, *In bonis*, 24, 25, 34, 39  
 Hort, Hunt v., 208  
 Horton, Brett v., 253  
   — v. Hall, 636  
   — v. Horton, 565, 566  
   — Medley v., 471  
   — v. Whittaker, 478  
 Horwood v. West, 382, 384  
 Hoskin's Trusts, *In re*, 181  
 Hosking v. Nicholls, 105, 106  
 Hoskins v. Matthews, 6  
 Hoste v. Blackman, 170  
   — v. Pratt, 247, 368  
   — Still v., 210  
 Hotchkin, Bateman v. (10 B. 426), 433  
   — Bateman v. (31 B. 486), 645  
   — v. Humfrey, 420  
 Hotchkiss's Trusts, *Re*, 494, 497  
 Hotham, Lord, A.-G. v., 291  
   — v. Sutton, 144, 185  
 Hough's Estate, *Re*, 578  
   — Will, *Re*, 346  
 Houghton v. Franklin, 142  
 Houlditch, Tulk v., 451  
 Houldsworth, Bennett v., 84, 587, 590  
 House v. House, 381  
   — v. Way, 202  
 Household, Littlejohns v., 513  
 Houston, Ellis v., 232  
   — v. Hughes, 349  
 Hovenden, Majoribanks v., 9, 11  
 Howell, *Ex parte*; Banks' Trust, *In re*, 371  
 Howard v. Chaffers, 631  
 Howard v. Collins, 508, 512  
   — v. Dryland, 641  
   — Fitzroy v., 164  
   — v. Howard, 484  
   — Sutcliffe v., 255, 394  
   — Vaudrey v., 190  
 Howarth v. Mills, 234, 235  
   — v. Rothwell, 636  
 Howden, *In bonis* Lord, 68  
 Howe v. Dartmouth, Lord, 199, 200  
   — Earl, Mundy v., 368  
   — Thornton v., 290  
 Howell v. Barnes, 355, 356  
   — Buckley v., 354  
   — Chandler v., 304  
   — v. Jenkins, 84, 86  
   — Pankhurst v., 597  
   — Thomas v. (18 Eq. 198), 295, 296, 578  
   — Thomas v. (1 Salk. 170), 450  
   — Wheeler v., 634  
 Howells, Powell v., 571  
 Howes, Gummoe v., 341, 511  
   — v. Herring, 493  
   — Humphreys v., 482  
 Howgrave v. Cartier, 419  
 Howorth v. Dewell, 376  
 Howse v. Chapman, 618, 620  
 Hoy v. Master, 375, 381  
 Hoyland, Weldon v., 254, 259  
 Hubbard v. Alexander, 116  
   — Huffam v., 509, 511  
   — v. Lees, 74  
 Hubbock, Hawkes v., 470  
 Huckvale, *In bonis*, 28  
 Huddart, Patterson v., 157, 183  
 Huddleston v. Gouldbury, 148  
 Huddlestons, Miller v., 113, 620, 622, 637  
 Hudson v. Cook, 294  
   — Dowling v., 632  
   — Kirkbank v., 308  
   — Massey v., 545  
   — v. Parker, 28  
   — Turner v., 253, 422  
 Hudsons, *In re*, 407  
 Huffam v. Hubbard, 509, 511  
 Huggins, Pasmore v., 239  
 Hughes, Arthur v., 484  
   — Combe v. (14 Eq. 415), 315, 316  
   — Combe v. (34 B. 127; 2 D. J. & S. 657), 447  
   — Doe v., 362, 363  
   — v. Ellis, 460  
   — v. Empson, 365  
   — v. Evans, 383  
   — Flint v., 379  
   — Houston v., 349  
   — v. Hughes (3 Bro. C. C. 434), 248

- Hughes v. Hughes (1 B. C. C. 387), 368  
   — Jenkins v., 323  
   — v. Jones, 161, 189  
   — Long v., 390  
   — v. Pritchard, 152  
   — v. Sayer, 545  
   — v. Stubbs, 9  
   — v. Turner, 175  
   — Williams v., 111  
 Hugo, *In bonis*, 66  
   — v. Williams, 337, 442  
 Huguenin, Davies v., 223, 225, 407  
 Huiah, Paget v., 110  
 Hull v. Christian, 396  
   — v. Hill, 150  
 Humberston v. Humberston, 441  
 Humberstone v. Stanton, 482  
 Humble v. Bowman, 73, 267  
   — v. Humble, 631  
   — v. Shore, 191  
 Hume v. Lloyd, 262  
   — Whicker v., 7, 290, 310  
 Humfrey, Hotchkin v., 420  
   — v. Humfrey, 499  
 Humpage, Grafftey v., 286  
 Humphery v. Humphery (36 L. T. N.S. 90), 171, 177  
 Humphrey v. Humphrey (1 Sim. N. S. 536), 375  
 Humphreys v. Howes, 482  
   — v. Humphreys (4 Eq. 475), 566  
   — v. Humphreys (2 Cox. 186), 623  
 Humphries v. Humphries, 121  
 Hungerford, Bristol, Countess of, v., 198, 382  
 Hunsdon, Bird v., 566  
 Hunt, *In bonis* (23 W. R. 553), 20  
   — *In bonis* (2 Rob. 622), 61  
   — Bromhead v., 573  
   — v. Dorsett, 253  
   — v. Hort, 208  
   — v. Hunt, 25  
   — Pinney v., 68  
   — Robinson v., 393, 539  
   — Foulston v. Furber, 389  
 Hunter, *Ex parte*, 493  
 Hunter's Trusts, *In re*, 415, 417, 513  
 Hunter, Bowker v., 616  
   — v. Bullock, 585  
   — Carron Company v., 134  
   — v. Cheshire, 496  
   — v. Judd, 411  
   — Pulsford v., 414  
   — Pulsford v., 415  
   — Ravenscroft v., 33  
 Huntington, Huntington v., 54  
 Hurford, Miles v., 558  
 Hurle, Hartley v., 165, 641  
 Hurlock, Jackson v., 56, 608  
 Hurrell, Doe d. Hurrell v., 159  
 Hurry v. Hurry, 499  
   — v. Morgan, 504  
 Hurst, A.-G. v., 619  
   — v. Beach, 114, 117  
 Huskinson v. Bridge, 381  
 Hussey v. Berkeley, 259  
   — Mordaunt v., 615  
 Hutcheon v. Mannington, 525  
 Hutcheson v. Hammond, 195, 196, 456, 601  
   — v. Jones, 244  
 Hutchin v. Osborne, 177  
 Hutchings v. Wood, 60  
 Hutchinson, *Re*, 517  
   — & Tenant, *In re*, 267, 384, 385  
   — v. Barron, 98  
   — Chamberlain v., 180  
   — v. Hutchinson, 149  
   — Metcalfe v., 634  
   — v. Smith, 151  
   — v. Stephens, 327  
 Huthwaite, Doe d. Chevalier v., 213  
 Hutton, *In bonis*, 63  
   — v. Simpson, 564  
 Hyde, A.-G. v., 309  
   — Hyde v., 36  
   — v. Mason, 38  
   — Paine v., 458  
   — Tylden v., 360  
 Hyder, Furley v., 647  
 Hyslop, Maxwell v., 90, 131  
  
 IBBETSON, *In bonis*, 34, 39  
   — v. Ibbetson, 438, 439  
 Ibbotson v. Elam, 134, 644  
 Ibbott v. Bell, 32  
 Ickeringill, *In re*; Hensley v. I., 181  
 Idle v. Cook, 323, 325, 537  
 Iggulden, Lancefield v., 110, 624  
 Iken, Maden v., 222  
 Ilchester, *Ex parte*, 37, 57  
 Illingworth v. Cooke, 209  
 Ilott v. Genge, 28  
 Ince, *In bonis*, 59  
 Inchiquin, Lord, Montagu v., 553  
 Inclendon v. Northcote, 140  
 Incorporated Church Building Society v. Coles, 303, 312  
 Incorporated Society v. Barlow, 307, 310  
 Incorporated Society v. Richards, 92, 162, 311, 530  
 Indian Chief, The, 7  
 Indigent Blind, School for the, Nethersole v., 311  
 Inge, Walker v., 81  
 Ingham v. Ingham, 434  
 Ingle's Trusts, *Re*, 210, 241



Ingleby, Carr v., 390  
 Inglefield v. Coghlan, 468  
 Ingleman v. Worthington, 636  
 Inglesant v. Inglesant, 27, 28  
 Ingoldby v. Ingoldby, 62  
 Ingram, Buckeridge v., 55  
   — Shepherd v., 137, 244  
   — v. Soutten, 486, 511  
   — Strong v., 118  
   — v. Suckling, 412  
   — v. Wyatt, 20  
 Innes v. Johnson, 109  
   — v. Mitchell, 393  
 Inakip, Braybroke, Lord, v., 168  
 Insole, Whitehouse v., 622  
 International Financial Society, Hope  
   v., 452  
 Ion v. Ashton, 304, 643  
 Irby, Sanford v. (4 L. J. Ch. 23),  
   157  
   — Sanford v. (3 B. & Ald. 654),  
   542  
 Iredell v. Iredell, 248, 252  
 Ireland, Churchman v., 89  
   — Lord Primate of, West v., 220  
 Iremonger, Barnwell v., 628  
 Ironmonger, Irvin v., 142  
 Irvin v. Ironmonger, 142  
 Irvine, Macdonald v., 103, 105, 111,  
   199, 203  
   — v. Sullivan, 64, 381, 383  
 Irving, James v., 190  
 Isaac v. Defries, 295  
   — v. Wall, 649  
 Isaacson, King v., 411  
   — v. Van Goor, 566  
 Israel v. Rodon, 35, 57  
 Ivatt, Wilson v., 616  
 Ivatt, Markham v., 188, 283  
 Ive v. King, 320, 494, 500, 514  
 Ives v. Dodgson, 574  
 Ivison v. Gassiot, 185  
 Izod v. Izod, 316  
 Izon v. Butler, 602  
   — Scott v., 366  
  
 JACKMAN, Stanley v., 321, 559, 560,  
   561  
 Jackson's Trusts, *In re*, 503  
   — Will, *In re*, 73  
 Jackson, Allen v., 399, 454  
   — v. Calvert, 374  
   — v. Dover, 418, 420  
   — Faulds v., 27, 28, 29  
   — Green v., 196  
   — v. Hamilton, 584, 624  
   — Harrison v., 108, 120  
   — Hogan v., 160

Jackson v. Hurlock, 56, 608  
   — v. Jackson (2 Cox 35), 115  
   — v. Jackson (1 Ves. sen. 216),  
   581  
   — Lloyd v., 326  
   — v. Noble, 478  
   — Oates v., 334  
   — Oates d. Hatterly v., 315  
   — v. Pease, 624, 626  
   — Pitt v., 335, 441  
   — Pratt v., 150  
   — v. Queen Anne's Bounty,  
     Governors of, 306  
   — Russell v., 65, 313  
   — v. Sparks, 507  
   — Walker v., 641  
 Jacobs v. Amyott, 372  
   — v. Jacobs, 274, 275, 283  
   — Jull v., 188, 401, 610  
 Jacques v. Chambers (2 Coll. 435),  
   101  
   — v. Chambers (4 Rail. Cases  
     499), 125  
 Jaggard, Cook v., 159  
   — Umbers v., 221, 222, 549  
 James, *In bonis* (1 S. W. & T. 238),  
   34  
   — *In bonis* (7 Jur. N. S. 52), 45  
   — Affleck v., 158  
   — v. Allen, 291, 298  
   — v. Baker, 485  
   — Boughton v., 443  
   — v. Dean, 122  
   — Hayward v., 522, 523  
   — v. Irving, 190  
   — Locke v., 39, 44, 56  
   — Merest v., 344  
   — Millar v., 67  
   — Phillips v., 560  
   — v. Shannon, 565, 567  
   — v. Shrimpton, 37  
   — v. Smith, 230, 258  
   — Symons v., 633, 634  
   — Williams v., 504  
 Jameson v. Cooke, 53  
 Jamson, Vezey v., 298, 614  
 Jardine, Hewitt v., 596  
 Jarman's Estate, *In re*, 291  
   — Estate, *In re*; Leavers v. Clay-  
     ton, 298  
   — Trusts, 518  
 Jarman, Cooper v., 205  
   — Silvester v., 148  
   — v. Vye, 534, 544  
 Jarvis, Brown v., 255, 394  
 Jauncey v. A.-G., 138  
 Jay, Ferrier v., 174  
   — Leach v., 159  
 Jeaffreson's Trusts, *In re*, 187, 372  
 Jebb v. Tugwell, 201

- Jee v. Audley, 430, 434  
 Jefferies v. Michell, 210, 594  
 Jeffery's Trusts, *In re*, 570  
 Jeffery v. De Vitre, 316, 317  
   — v. Honeywood, 315, 317, 334  
   — Roe d. Sheers v., 546  
 Jeffrey's Trusts, 106  
 Jeffreys v. Conner, 533, 648  
   — v. Jeffreys, 106  
 Jeffries v. Alexander, 305  
   — Tuckerman v., 394  
 Jegen, Archer v., 422  
   — Vivian v., 351  
 Jellicoe, Cusack v., 140  
   — Gardiner v., 549, 551  
 Jenkins, Flinn v., 254  
   — v. Gaisford, 23  
   — v. Gower, 276  
   — Howell v., 84, 86  
   — v. Hughes, 323  
   — v. Jenkins, 520  
   — v. Jones, 119  
   — Tatlock v., 577, 640  
   — Wilmot v., 623  
   — Woolley v., 359  
 Jenkinson, Murthwaite v., 348  
 Jenkyns v. Gaisford, 24  
 Jenner v. Ffinch, 29, 42  
   — v. Turner, 454  
 Jennings v. Baily, 375  
   — Barnes v., 482, 494  
   — v. Gallimore, 285, 286  
   — Holgate v., 203  
   — v. Jennings, 96  
   — Rawlings v., 185, 374, 392, 617  
   — Springett v., 133  
 Jepson v. Key, 98  
 Jerningham v. Herbert, 584  
 Jerny v. Preston, 206  
 Jersey, Earl of, Doe d. Beach v., 96, 99  
 Jervis v. Pond, 496  
   — Radburn v., 62, 388  
   — v. Wolferstan, 602  
 Jervoise v. Jervoise, 85  
   — v. Northumberland, Duke of, 557  
 Jessop, Doe d. Usher v., 528  
 Jesson v. Wright, 336, 337, 338, 341  
 Jessop, *Re*, 579  
 Jesus Coll., A.-G. v., 300  
 Jewis v. Lawrence, 288  
 Jewks, Sutton v., 454  
 Jex, Hodgson v., 184  
 Jeyes, Doe d. Pell v., 163  
   — v. Savage, 418, 493, 533  
 Jobling, Black v., 43  
 Johnson's Case, 278  
 Jodrell v. Jodrell, 646  
   — Wilkins v. (11 W. R. 588), 150  
 Jodrell, Wilkins v. (13 Ch. D. 564), 391, 396, 485  
 Joel v. Mills, 462  
 Johnson, *In bonis*, 52  
 Johnson's Trusts, *In re* (2 Eq. 716), 552, 553  
   — Trusts, *Re* (10 L. T. N. S. 455), 487, 514  
 Johnson, *In re*; Shearman v. Robinson, 366  
   — v. Antrobus, 485  
   — v. Arnold, 192  
   — Bird v., 461  
   — v. Bull, 64  
   — v. Child, 126  
   — v. Cope, 253  
   — v. Crook, 526  
   — Doe d. Johnson v., 542  
   — v. Foulds, 223, 410  
   — v. Harrowby, Lord, 118  
   — Innes v., 109  
   — v. Johnson (2 Coll. 441), 199  
   — v. Johnson (3 Ha. 157), 605  
   — v. Johnson (4 B. 318), 603, 611  
   — v. Lyford, 47  
   — Newstead v., 616  
   — v. O'Neill, 141  
   — v. Routh, 199, 647  
   — v. Simcock, 530  
   — v. Smaling, 486  
   — v. Swann, 306  
   — Taylor v., 142  
   — v. Telford, 90  
   — v. Wells, 57  
 Johnston v. Beattie, 4, 6  
   — Edgeworth v., 596  
   — v. Johnston, 56  
   — v. Moore, 201  
   — Murphy v., 333  
   — v. Swann, 304, 308  
 Johnstone's Settlement, *In re*, 121  
 Johnstone, A.-G. v., 189  
   — v. Baber (4 W. R. 827), 154  
   — v. Baber (8 B. 233), 355  
   — Bempde v., 5  
   — Fairtlough v., 82  
   — v. Hamilton, 612, 614  
   — Murray v., 576  
 Jones, *In bonis* (46 L. J. P. 80), 23  
   — *In bonis* (34 L. J. P. 41), 25  
   — *In bonis* (Dea. & Sw. 3), 27  
   — *In re*; Jones v. Calless, 619  
 Jones' Estate, *In re*, 501  
   — Estate, *In re*; Hume v. Lloyd, 262  
   — Will, *In re*, 459  
 Jones, Adams v., 214  
   — Atkinson v., 191  
   — A.-G. v., 9  
   — v. Badley, 65

- Jones v. Bruce, 641  
 — Burke v., 629  
 — v. Caleem, 619  
 — v. Colbeck, 265  
 — v. Cullimore, 546  
 — v. Curry, 170  
 — v. Davies, 479  
 — Edwards v. (33 B. 384), 321  
 — Edwards v. (35 B. 474), 584  
 — Evans v. (2 Coll. 516), 189, 261  
 — Evans v. (46 L. J. Ex. 280), 159  
 — v. Frewin, 494  
 — Goodright v., 477  
 — v. Green, 119  
 — Griffith v., 295  
 — v. Henley, 215  
 — Hill v. (37 L. J. Ch. 46), 118  
 — Hill v. (2 W. R. 657), 308  
 — Hogg v., 552  
 — Hughes v., 161, 189  
 — Hutcheson v., 244  
 — Jenkins v., 119  
 — v. Jones (1 Q. B. D. 279), 453  
 — v. Jones (13 Sim. 561), 522  
 — v. Jones (5 Ha. 440), 635, 649  
 — Lucas v., 303  
 — v. Mackilwain, 413  
 — Macoubrey v., 223, 224  
 — v. Magga, 446, 448  
 — v. Mitchell, 195  
 — v. Morgan (1 B. C. C. 206), 336  
 — v. Morgan (Fearn, C. R. App. 577; 3 B. P. C. 322), 547  
 — v. Newman, 210, 211  
 — v. Nicolay, 10  
 — Noel v., 386  
 — v. Ogle, 135  
 — v. Price, 263  
 — v. Randall, 395  
 — Ravenscroft v. (32 B. 669), 595, 596  
 — Ravenscroft v. (4 D. J. & S. 228), 597  
 — v. Robinson, 157  
 — Rogers v., 81  
 — v. Ryan, 543  
 — v. Salter, 470  
 — v. Say, Ld., 347  
 — Scott v., 629  
 — v. Skinner, 162  
 — v. Southall, 120, 179  
 — Stewart v., 493, 604, 605  
 — v. Suffolk, 450  
 — Thomas v., 73, 177, 179  
 — Tilson v., 484  
 — v. Tucker, 171, 175  
 — Wellbeloved v., 301  
 Jones v. Westcomb (1 Eq. Ab. 245, pl. 10), 481, 482  
 — v. Westcomb (Prec. Ch. 316), 616  
 — Williams v., 617  
 — d. Henry v. Hancock, 584  
 Jongsma v. Jongsma, 157  
 Jopp v. Wood (34 B. 88; 13 W. R. 481), 3  
 — v. Wood (28 B. 53; 2 D. J. & S. 323), 521  
 Jordan, *In bonis*, 66, 67  
 Jordan's Trust, *Re*, 496  
 Jordan v. Fortescue, 574  
 — v. Lowe, 374  
 Jordon v. Adams, 272, 339, 341  
 Joseph, Abraham v., 45  
 Joslin v. Hammond, 484  
 Josselyn, Scott v., 376  
 — Sparrow v., 108, 109  
 Joughin, Wilkinson v., 215  
 Joys, *In bonis*, 42  
 Jubber v. Jubber, 219, 385, 584  
 Judd, Hunter v., 411  
 — v. Judd, 411  
 Juler v. Juler, 613  
 Jull v. Jacobs, 188, 401, 610  
 Justice, Parsons v., 248, 251  
 Jutting, Wrench v., 185, 188  
 KANE v. Cosgrave, 301  
 Kavanagh's Will, *Re*, 260  
 Kavanagh v. Morland, 343  
 Kayes, Tucker v., 608  
 Kearley v. Woodcock, 460, 463  
 Keating v. Brooks, 26  
 — v. Keating, 365  
 Keatinge, Kelly v., 28  
 Kebbel, Bataford v., 413  
 Keble, Mathews v., 445, 446, 630  
 Keeling v. Brown, 632  
 Keen v. Keen, 47  
 Keep's Will, *In re*, 504  
 Kehoe v. Wilson, 293  
 Keigwin, Keigwin v., 28  
 Keighley, Malin v., 382, 384  
 Kelly v. Fowler, 544  
 Keir, Da Costa v., 488  
 Kekewick, Peard v., 430, 445  
 Kell v. Charmer, 95, 208  
 Kellett v. Kellett (3 Dow. 243), 152, 382  
 — v. Kellett (L. R. 3 H. L. 160), 375, 378  
 — v. Kellett (L. R. 5 Eq. 298), 570, 603  
 — Russell v., 296, 297  
 Kelly, *Re*, 637

- Kelly, Allen *v.*, 105  
   — Belaney *v.*, 380  
   — *v.* Duffy, 162  
   — Duggan *v.*, 454, 490  
   — Fitzwilliam *v.*, 112, 125  
   — *v.* Hammond, 229  
   — *v.* Keatinge, 28  
   — *v.* Pollock, 322  
   — *v.* Powlett, 150  
 Kelsey *v.* Ellis, 395, 497  
   — *v.* Kelsey, 387  
 Kelvington *v.* Parker, 579  
 Kelynge, Phipps *v.*, 444  
 Kemeys, Denn d. Wilkins *v.*, 530  
 Kempson, Thornton *v.*, 304  
 Kendall's Trust, 183  
 Kendall *v.* Granger, 291, 298  
   — *v.* Kendall, 183  
 Kenebel *v.* Scrafton, 56, 57, 226  
 Kenlis, *Id.*, *v.* Bective, Earl of, 550  
 Kennedy, Bell *v.*, 4, 5, 7  
   — Bethune *v.*, 112, 201  
   — *v.* Kennedy, 101  
   — *v.* Kingston, 73, 251  
   — Molony *v.*, 467  
   — Ryall *v.*, 4  
   — *v.* Sidgwick, 532  
   — Withers *v.*, 633  
 Kennell *v.* Abbott, 197, 215  
 Kennerley *v.* Kennerley, 559  
   — Swaine *v.*, 226  
 Kennett, *In bonis*, 37  
   — Sheffield *v.*, 533  
 Kennicott, Henderson *v.*, 521  
 Kennington, Cross *v.*, 633  
 Kenny, Sherwin *v.*, 328  
 Kenrick *v.* Beaucherk, Lord, 347, 352  
   — Curteis *v.*, 172  
 Kent, A.-G. *v.*, 6, 7  
   — Brooke *v.*, 89  
   — Gendre *v.*, 134  
   — Marsden *v.*, 385  
 Kenworthy *v.* Ward, 318  
 Keogh, Ryan *v.*, 385, 396  
 Keown's Estate, 180  
 Ker *v.* Dungannon, Lord, 439  
   — *v.* Ker, 133  
 Kermod *v.* Macdonald, 108, 576, 580  
 Kerr's Trusts, *In re*, 318  
 Kerr *v.* Clinton, Baroness, 578  
   — *v.* Middlesex Hospital, 391, 392  
 Kerran, Smith *v.*, 77  
 Kerridge, Lynn *v.*, 145  
 Kerrison's Trusts, *In re*, 368  
 Kershaw's Trusts, 369  
 Kershaw, Williams *v.*, 298  
 Kett, Back *v.*, 89  
 Kevern *v.* Williams, 247  
 Kevil *v.* Lynch, 24  
 Key, Jepson *v.*, 98  
 Key *v.* Key (1 Jur. N. S. 372), 528  
   — *v.* Key (4 D. M. & G. 73), 405, 538  
   — Scott *v.*, 385  
 Keymer, Willis *v.*, 383  
 Kiallmark *v.* Kiallmark, 460  
 Kibbet *v.* Lee, 74  
 Kidd *v.* North, 115  
   — Shand *v.*, 492  
 Kiddell, Sanders *v.*, 143  
 Kidman *v.* Kidman, 141, 417  
 Kidney *v.* Cousmaker (12 Ves. 136), 84  
   — *v.* Cousmaker (1 Ves. jun. 436), 194  
 Kilbee, Seymour *v.*, 569  
 Kilburne, Theobridge *v.*, 371  
 Kilcher, *In bonis*, 31  
 Killick, *Ex parte*, 469  
 Kilmorey, Lord, Leche *v.*, 386  
 Kilner *v.* Leech, 276  
 Kilpatrick, Kirkpatrick *v.*, 490  
 Kilvert's Trusts, 207, 297  
 Kimber, Lywood *v.*, 271  
 Kimberley *v.* Tew, 422  
 Kinch *v.* Ward, 337  
 King, *In bonis*, 33  
 King's Mortgage, 148  
 King *v.* Bennett, 220  
   — *v.* Burchell, 345  
   — *v.* Cleveland, 284, 285, 492  
   — *v.* Cullen, 246, 520  
   — *v.* Denison, 382, 608, 615  
   — *v.* Foxwell, 5, 8  
   — *v.* George, 183  
   — *v.* Hake, 421  
   — Hegarty *v.*, 20  
   — *v.* Isaacson, 411  
   — Ive *v.*, 320, 494, 500, 514  
   — *v.* King, 85  
   — Mackenzie *v.*, 581  
   — Moore *v.*, 26  
   — O'Donohoe *v.*, 545  
   — *v.* Ringstead, 564, 565  
   — Skipper *v.*, 419  
   — Smith *v.*, 388  
   — *v.* Taylor, 484  
   — Theobald *v.*, 200  
   — Urquhart *v.*, 615, 617  
   — Vanderplank *v.*, 320, 430, 441, 572  
   — Whiteley *v.*, 47  
   — *v.* Withers, 407  
   — Wollaston *v.*, 82, 440  
   — *v.* Wonstanley, 304  
 King's Proctor *v.* Daines, 10  
 Kingsbury, Tricker *v.*, 455  
 Kingscote, Pennant *v.*, 26  
 Kingston's Estate, *In re*, 178  
 Kingston, Bull *v.*, 376

- Kingston, Kennedy *v.*, 73, 251  
 Kinsella *v.* Caffray, 569  
 Kirby *v.* Potter, 106  
 Kirk, *Ex parte*; Bennett, *In re*, 102,  
     149  
     — *Davis v.*, 269  
     — *v.* Eddowes, 596  
     — *v.* Paulin, 467  
 Kirkbank *v.* Hudson, 308  
 Kirkbride's Trusts, *In re*, 526, 530  
 Kirke *v.* Kirke, 39, 44  
 Kirkman *v.* Booth, 366  
     — *v.* Lewis, 585  
 Kirkpatrick *v.* Bedford, 114, 138  
     — *v.* Kilpatrick, 490  
 Kirsopp, Grieseson *v.*, 250  
 Knapman's Estate, *In re*; Knapman  
     *v.* Wreford, 123  
 Knapp *v.* Knapp, 421  
     — *v.* Noyes, 490  
     — *v.* Williams, 304  
 Knapping *v.* Tomlinson, 437  
 Knight, Blake *v.*, 28  
     — Boughton *v.* (3 P. & D. 64), 14  
     — *v.* Boughton (3 B. 148; 11 Cl.  
         & T. 513), 380  
     — *v.* Browne, 462  
     — *v.* Davis, 125  
     — *v.* Ellis, 374  
     — *v.* Gould, 607  
     — Hobbs *v.*, 45  
     — *v.* Knight (2 S. & St. 490), 141,  
         415  
     — *v.* Knight (25 B. 111), 510  
     — Leese *v.*, 576  
     — Lovell *v.*, 172  
     — Parkin *v.*, 331, 373  
     — *v.* Robinson, 148  
     — *v.* Selby, 328  
 Knightley, Farrington *v.*, 615  
     — Trower *v.*, 359  
 Knightly, Yarrow *v.*, 321, 327, 328  
 Knipe, Ogle *v.*, 144, 148  
 Knocker *v.* Bunbury, 355  
 Knollys *v.* Shepherd, 167  
 Knowles, *In re*; Roose *v.* Chalk, 614,  
     617  
     — Ashling *v.*, 495  
 Knox *v.* Wells, 217, 418  
 Koe, Clifford *v.*, 334  
 Kuffin, Roberts *v.*, 102, 186  
 Kymaston, Norman *v.*, 377  
 Kynock, Cooper *v.*, 351  
 Lacy, Dick *v.*, 254, 373  
 Ladley, Ricketts *v.*, 110  
 Laing *v.* Cowan, 178, 180  
     — *v.* Laing, 559  
 Lainson *v.* Lainson, 610  
 Lake *v.* Currie, 177  
     — Gould *v.*, 32  
     — Lord, Selsey, Lord, *v.*, 242  
     — White *v.*, 152  
 Laker *v.* Hordern, 228, 230  
 Lakin *v.* Lakin, 187  
 Lamb, *In bonis*, 54  
     — Blacket *v.*, 85  
     — Bland *v.*, 182, 189  
     — Salisbury *v.*, 511, 528  
 Lambarde *v.* Peach, 548, 550  
     — *v.* Turton, 550  
 Lambe *v.* Eames, 267, 385  
     — Lock *v.*, 247, 412, 415  
 Lambert *v.* Browne, 347, 355  
     — Cook *v.*, 29  
     — Dick *v.*, 615  
     — *v.* Lambert (11 Ves. 607), 107  
     — *v.* Lambert (16 Eq. 320), 646  
     — *v.* Parker, 140  
     — Taylor *v.*, 407, 411  
     — *v.* Thwaites, 250, 251  
     — Wright *v.*, 647  
     — Zouch *v.*, 615  
 Laming, Doe *v.*, 338  
 Lamkin *v.* Babb, 53  
 Lampet's Case, 472  
 Lampher *v.* Despard, 184  
 Lampley *v.* Blower, 317, 373  
 Lancashire, Doe *v.*, 56  
 Lancaster, *In bonis* (29 L. J. P. 155),  
     61  
     — *In bonis* (1 Sw. & T. 464), 66  
     — *v.* Thornton, 355  
     — Willan *v.*, 632  
 Lance *v.* Aglionby, 641  
 Lancefield *v.* Iggulden, 110, 624  
 Land *v.* Devaynes, 122  
     — Lowe *v.*, 504  
 Landen, Brydges *v.*, 632  
 Lane, *In re*; Luard *v.* Lane, 103, 120  
     — *v.* Debenham, 355  
     — Finch *v.*, 403  
     — *v.* Goudge, 418, 416  
     — *v.* Green, 243  
     — Luard *v.*; Lane, *In re*, 103,  
         120  
     — *v.* Pannel, 245  
     — *v.* Sewell, 151  
     — *v.* Stanhope, 165  
 Lanesborough, Lady, *v.* Fox, 432, 547  
 Laneville, Anderson *v.*, 7  
 Lang's Will, 281  
 Lang *v.* Pugh, 412  
 Langdale, Lord, Ashton *v.*, 306

- Langdale, Lady, *v.* Briggs, 106  
   — *v.* Esmonde, 112  
   — Whitfield *v.* (1 Ch. D. 61), 96,  
     99  
   — *v.* Whitfield (4 K. & J. 426),  
     146  
 Langdon, Gibbons *v.*, 518  
 Langford, *In bonis*, 76  
   — *v.* Gowland, 296  
 Langham, Morrice *v.* (11 Sim. 260 ;  
   12 Sim. 615), 550  
   — Morrice *v.* (8 M. & W. 194),  
     551  
   — *v.* Nenny, 171  
   — *v.* Sanford, 616  
 Langlands, Doe d. Walls *v.*, 157  
 Langley *v.* Baldwin, 538  
   — Broughton *v.*, 336  
   — *v.* Langley, 518  
 Langston *v.* Langston (21 B. 552), 83  
   — *v.* Langston (8 Bl. N. S. 16),  
     225  
 Langton, Doe d. Gore *v.*, 156  
 Langworthy, Darley *v.*, 400  
 Lanco, Parsons *v.*, 59  
 Lanphier *v.* Buck, 321, 498, 499  
 Lantsbery *v.* Collier, 359, 433  
 Larcher, Bright *v.*, 194, 636, 640  
 Large's Case, 460  
 Larnier *v.* Larnier, 145  
 Laroche, Cooper *v.*, 430  
   — *v.* Davies, 493  
 Lascelles, Agar-Ellis *v.*, 80  
 Lashley, Hogg *v.*, 10  
 Lashmar, Thorncroft *v.*, 10  
 Laslett, Walpole *v.*, 406  
 Lassence *v.* Tierney, 377, 378  
 Lathbury, Tait *v.*, 354  
 Laundry *v.* Williams, 142  
 Lavender *v.* Adams, 33  
   — Adams *v.*, 593  
   — Archer *v.*, 466  
 Laver, Doutty *v.*, 477  
 Laverton, Martin *v.*, 168  
 Lavie, Lechmere *v.*, 379  
 Law *v.* Thompson, 526  
   — *v.* Thorp, 373  
 Lawday, West *v.* (11 H. L. 375), 98  
   — West *v.* (1 R. 2 Eq. 517), 619  
 Lawes, A.-G. *v.*, 292  
   — *v.* Bennett, 204  
 Lawless, Alder *v.*, 393  
   — Parfitt *v.*, 21  
   — Shaw *v.*, 380  
 Lawley, Thomson *v.*, 165  
 Lawlor *v.* Henderson, 264  
 Lawrance, Brownson *v.*, 131, 132  
 Lawrence, Gibbs *v.*, 186  
   — Jewis *v.*, 288  
   — *v.* Lawrence, 89  
 Lawrence *v.* Wallis, 16  
 Laws, Blacklow *v.*, 354, 467  
   — Meyrick *v.*, 549  
 Lawson, Dempsey *v.*, 42  
   — Doe *v.*, 280, 282  
   — Nightingale *v.*, 649  
   — Tewart *v.*, 445  
 Lawton, Doe d. Knott *v.*, 327  
 Laxton *v.* Eedle, 396  
 Lay, *In bonis*, 52  
   — Franklin *v.*, 332  
 Layton, Treharne *v.*, 533  
 Lazouby *v.* Rawson, 636  
 Lea, Barker *v.*, 415, 417, 517  
   — *v.* Thorp, 253  
 Leach *v.* Jay, 159  
   — *v.* Leach, 604  
 Leacroft *v.* Maynard, 118  
 Leadbeater, Assignees of, 546  
   — *v.* Cross, 405  
 Leake *v.* Leake, 223, 591, 592  
   — *v.* Macdowell, 287  
   — *v.* Robinson, 409, 436  
 Lean *v.* Lean, 201  
 Leapingwell, Page *v.*, 106, 110, 113,  
   302  
 Lear *v.* Leggett, 463  
 Leaver, Sollory *v.*, 387  
 Leavers *v.* Clayton, 291, 298  
 Le Breton, Eagles *v.*, 264  
 Leche *v.* Kilmorey, Lord, 386  
 Lechmere *v.* Carlisle, Earl of, 193  
   — *v.* Lavie, 379  
 Leckey *v.* Watson, 123  
 Le Despencer, Bankes *v.*, 558, 560  
 Ledger *v.* Hooker, 115  
 Ledward *v.* Hassels, 458  
 Lee's Case, 541  
   — Trusts, *In re*, 386  
 Lee *v.* Flinn, 546  
   — Goodwin *v.*, 127  
   — Graham *v.*, 463  
   — Kibbet *v.*, 74  
   — *v.* Lee (27 L. J. Ch. 824), 120  
   — *v.* Lee (1 Dr. & Sm. 85), 281  
   — *v.* Olding, 423  
   — *v.* Pain, 95, 114, 117, 208, 210,  
     214, 242, 606  
   — *v.* Prieaux, 467  
   — *v.* Stone, 506  
   — Vincent *v.*, 357  
 Leech *v.* Bates, 23  
   — Kilner *v.*, 276  
 Leeds, Duchess of, Lovat, Lord, *v.*,  
   143, 635  
   — Duke of, *v.* Munday, 169  
   — Duke of, Osborne *v.*, 116  
 Leeming *v.* Sherratt, 417, 506, 511,  
   517, 539  
 Lees, Biddulph *v.*, 323, 536

- Lees, Hubbard *v.* 74  
   — *v.* Lees, 173  
   — *v.* Massey, 265  
   — *v.* Musley, 343, 345  
 Leese, *In bonis* (2 Sw. & T. 442), 41, 76  
   — *In bonis* (17 Jur. 216), 53  
   — *v.* Knight, 576  
 Lefroy *v.* Flood, 311  
 Legatt *v.* Sewell, 338  
 Le Gay, Morris *d.* Andrews *v.*, 337  
 Legg, Archer *v.*, 253  
   — Maddock *v.*, 259  
 Legge *v.* Asgill, 145, 188  
   — Bagot *v.* (12 W. R. 1097; 4 N. R. 492), 542, 549  
   — Bagot *v.* (2 Dr. & Sm. 259), 626  
 Leggett, Lear *v.*, 463  
 Legh, Nanfan *v.*, 329  
 Le Grice *v.* Finch, 108  
 Leigh, Blake *v.*, 91  
   — *v.* Byron, 228  
   — Forrester *v.*, 627  
   — *v.* Leigh (15 Ves. 100), 278  
   — *v.* Leigh (17 B. 605), 606  
   — Lutkins *v.*, 126  
   — Wight *v.*, 539  
 Leighton *v.* Baillie, 182  
   — *v.* Leighton, 595  
 Leitch, Hall *v.*, 574  
 Le Jeune *v.* Le Jeune, 507  
 Lemage *v.* Goodban, 41, 42  
 Leman *v.* Bonsall, 53  
 Le Marchant *v.* Le Marchant, 384  
 Lemayne *v.* Stanley, 24  
 Lemprière, Australia, London Chartered Bank of, *v.*, 624  
   — Cuthbert *v.*, 579  
   — *v.* Valpy, 172  
 Lennard, Lady, Nevinsan *v.*, 146  
   — Stanley *v.*, 538  
   — Teynham, Lady, *v.*, 79  
 Leonard, *In re*, 200  
   — Galland *v.*, 487  
   — *v.* Sussex, Earl of, 337, 557, 560  
   — Willson *v.*, 630  
 Leonino *v.* Leonino, 133  
 Lepine *v.* Bean, 231, 527  
 Lescher, Bain *v.*, 316, 607  
 Lealie *v.* Leslie (I. R. 6 Eq. 332), 42  
   — *v.* Leslie (Ll. & G. t. Sug. 1), 140  
   — Sing *v.*, 181, 224  
 Lester, Basil *v.*, 444  
 L'Estrange, Love *v.*, 412  
 Le Sueur *v.* Le Sueur, 5  
 Le Tavernier, De Tastet *v.*, 464  
 Lethbridge *v.* Lethbridge, 157  
   — Somerville *v.*, 442  
   — *v.* Thurlow, 594  
 Lethieullier *v.* Tracy, 477  
 Lett *v.* Randall (10 Sim. 112), 477  
   — *v.* Randall (3 Sm. & G. 83; 2 D. F. & J. 388), 392, 611  
   — Stahlschmidt *v.*, 621  
 Leventhorpe *v.* Ashbie, 371  
 Levy, Phillips *v.*, 448  
   — *v.* Solomon, 227  
 Lewes and East Grinstead Ry. Co., Peters *v.*, 359  
   — *v.* Lewes, 396  
 Lewin, Craigie *v.*, 3, 5, 6  
 Lewis, *In bonis* (31 L. J. P. 153), 31  
   — *In bonis* (1 Sw. & T. 31), 45  
   — *v.* Allenby, 307  
   — *v.* Boetseur, 629  
   — Bowles' Case, 336  
   — Clifford *v.*, 631  
   — Collins *v.*, 620, 627  
   — Ellis *v.*, 88  
   — Gilbert *v.*, 468  
   — Heath *v.*, 399, 454  
   — Kirkman *v.*, 585  
   — *v.* Lewis (1 Phillim. 109), 54  
   — *v.* Lewis (L. R. 11 Eq. 340), 83, 589  
   — *v.* Lewis (13 Eq. 219), 129  
   — *v.* Lewis (1 Cox 162), 386  
   — *v.* Llewellyn, 171  
   — *v.* Mathews (L. R. 2 Eq. 177), 169, 468  
   — *v.* Matthews (8 Eq. 277), 287  
   — *v.* Morris, 277  
   — Plunkett *v.*, 592  
   — *v.* Puxley, 333  
   — *v.* Rees, 351  
   — Spink *v.*, 280  
   — *v.* Templer, 422, 431, 547  
   — *v.* Waters, 477  
   — Williams *v.*, 371  
   — Wyld *v.*, 563  
   — *d.* Ormond *v.* Waters, 323, 536  
 Lewthwaite, Clennell *v.*, 616  
   — *v.* Thompson, 331  
 Ley, Foster *v.*, 143  
   — *v.* Ley, 635  
   — Pentecost *v.*, 102  
 L'Huille *v.* Wood, 53  
 Liardet, De Garagnal *v.*, 507  
 Lichfield *v.* Baker, 203  
   — Ulrich *v.*, 578  
 Liddard *v.* Liddard, 381  
 Liddell, Barrington *v.*, 445, 446  
   — Gee *v.* (L. R. 2 Eq. 341), 502  
   — Gee *v.* (35 B. 621), 592  
   — Hope *v.*, 169, 364  
 Liddiard, Smith *v.*, 257  
 Liege, Thicknesse *v.*, 533  
 Lightbourne *v.* Gill, 460  
 Lightburne, Fowler *v.*, 351  
 Lightfoot *v.* Burstall, 191

- Lightfoot, Doe d. Roylance v., 168  
 Lifford, Lord, v. Powys Keck (30 B. 800), 162  
     — Lord, v. Powys Keck (L. R. 1 Eq. 847), 628  
 Lill v. Lill, 393, 511  
 Lilley v. Hay, 295  
 Limerick, Earl of, Gray v., 223  
 Lincoln's Case, Lord, 575  
 Lincoln, Countess of, v. Newcastle, Duke of, 553  
     — Lady, v. Pelham, 222  
 Lindgren v. Lindgren, 102  
     — Wilkinson v., 290  
 Lindo, Mocatta v., 522, 523  
 London v. Fleetwood, 562  
 Lindsay, *In bonis*, 11  
     — *Re*, 240  
     — v. Ellicott, 279  
     — v. Wicklow, Earl of, 134  
 Lindsell v. Thacker, 169  
 Line v. Hall, 441  
 Lineham, Murphy v., 451  
 Lingon v. Foley, 634  
 Linley v. Taylor, 88, 305  
 Lipecomb v. Lipecomb, 183  
 Lisle v. Lisle, 73  
 Lister v. Bradley, 412  
     — Hollmrake v., 458  
     — v. Pickford, 155  
     — Simpson v., 200, 201  
     — v. Smith, 11  
 Little, Millar v., 106  
 Littlejohns v. Household, 513  
 Littleton, Winn v., 208  
 Littlewood, Atkinson v., 593, 594  
     — Waite v., 504  
 Liverpool, Mayor of, Stevenson v., 349, 472  
 Livesay v. Livesay (2 H. L. 419), 220, 222  
 Livesey v. Livesey (3 Russ. 287), 414  
 Livock, *In bonis*, 39  
 Llewellyn's Trust, 200  
 Llewellyn, Lewis v., 171  
 Lloyd, *In bonis*, 76  
 Lloyd's Estate, *Re*, 184  
 Lloyd, A.-G. v., 578  
     — Avern v., 370, 395, 434  
     — Bailey v., 174  
     — v. Carew, 336  
     — v. Davies, 488  
     — Harris v., 226, 244, 247  
     — Hume v., 262  
     — v. Jackson, 326  
     — v. Lloyd (7 Eq. 458), 158  
     — v. Lloyd (4 B. 231), 190  
     — v. Lloyd (2 Sim. N. S. 255), 291, 453  
     — v. Lloyd (3 K. & J. 20), 409  
 Lloyd v. Lloyd (2 Eq. 722), 465  
     — Morris v., 163, 326  
     — v. Roberts, 27  
     — v. Williams, 139  
 Loch v. Bagley, 559  
 Lock v. Venables, 134  
 Locke v. James, 39, 44, 56  
     — v. Lamb, 247, 412, 415  
     — Nockolds v., 255  
     — Pierce v., 588  
 Lockhart v. Hardy, 386, 639  
 Lockley, Price v., 500  
 Lockton v. Lockton, 360  
 Lockwood, Eastwood v., 221, 584  
 Lockyer, Pym v. (12 Sym. 394), 463  
     — Pym v. (5 M. & C. 48), 595, 596  
 Lodge, Baskett v., 555  
 Loftus v. Stoney, 157, 158  
 Logan v. Bell, 72  
 Loman, Pearce v., 628  
 Lomas, A.-G. v., 199  
     — Williams v., 624  
 Lomax v. Holmdon (1 Ves. sen. 290), 220  
     — v. Holmedon (3 P. W. 176), 397  
 Lombe v. Stoughton (18 L. J. Ch. 100), 155  
     — v. Stoughton (12 Sim. 304), 444  
 Londesborough, Lord, v. Somerville, 634  
 London and South-Western Railway Company v. Bridger, 346  
     — Bishop of, Benet College v., 92, 311  
     — Bishop of, Hill v., 126  
     — Corporation of, v. Riggs, 156  
     — Hospital, Governors of, Robinson v., 194, 311  
     — Lord Mayor of, v. Russell, 117  
     — University of, v. Yarrow, 307  
     — University of, Yates v., 450  
 Long v. Blackall, 282, 285  
     — Carne v., 93, 291, 430  
     — v. Hughes, 390  
     — Martin v., 543  
     — Milsome v., 160  
     — v. Short, 110, 624  
     — v. Watkinson, 286  
 Longdon v. Simpson, 445  
 Longford v. Purdon, 14, 21  
 Longhead v. Phelps, 436  
 Longley v. Longley, 158  
 Longman, Tiffin v., 264, 265  
 Longmore v. Broom, 250, 491  
     — v. Elcum, 396  
 Longridge, Hawks v., 189  
 Longrigg, Hetherington v.; Barker's Estate, *In re*, 191  
 Longstaff v. Rennison, 307, 308



- Longworth v. Bellamy, 217  
   — Darley v., 577  
 Lord, Andrews v., 488, 490  
   — v. Bunn, 463  
   — v. Godfrey, 201  
   — v. Lord, 138, 139  
   — Moorhouse v., 3  
 Lorimer, *Re*, 467  
 Loring v. Thomas, 239, 497  
 Lascombe v. Wintringham, 290, 297, 299  
 Losh, Baxter v., 573  
   — Middleton v., 446  
 Louch v. Peters, 143  
 Lovat, Lord, v. Leeds, Duchess of, 143, 635  
 Love, *In re*; Green v. Tribe, 610  
   — v. Gaze, 382, 613  
   — v. L'Estrange, 412  
 Lovegrove, *In bonis*, 12  
 Lovejoy v. Carter, 239  
   — Cheese v., 44  
 Loveland, Chorley v., 222  
 Lovell v. Knight, 172  
 Loveman, *In re*; Watson v. Watson, 120  
 Low, Edmunds v., 592  
   — v. Smith, 273  
 Lowater, Robinson v., 362  
 Lowe, *In bonis*, 76  
   — Bennett v., 539  
   — Butler v., 248, 252  
   — Clayton v., 488, 489  
   — v. Davies, 341  
   — Jordan v., 374  
   — v. Land, 504  
   — v. Mannors, 456  
   — v. Pennington, 175  
   — v. Thomas, 144, 145  
 Lowes v. Lowes, 88  
 Lowndes, Coots v., 131  
   — Fox v., 305  
   — Gorst v., 444  
   — v. Lowndes, 175  
   — v. Norton, 646  
   — v. Stone, 277  
 Lowry, *In bonis* (5 N. of C. 619), 10  
   — *In bonis* (3 P. & D. 157), 77  
   — v. Pattison, 456  
 Lowther v. Bentinck, 369  
   — v. Cavendish, 400  
   — Hertford, Marquis of, v., 151, 182  
   — Suisse v., 117  
 Lubbock, Clarke v., 490  
 Lucas v. Brandreth, 192, 275  
   — v. Cuddy, 258  
   — v. Goldsmid, 266  
   — v. Jones, 303  
 Lucas, Newton v., 98  
   — Seymour v., 465  
   — Willis v., 326  
 Lucena v. Lucena, 506, 507  
 Luckcraft v. Pridham (6 Ch. D. 205), 311  
   — v. Pridham (48 L. J. Ch. 636), 624, 626, 628, 641  
 Luckie, Bird v., 280  
 Lucknow v. Brown, 368  
 Lucraft, Doe d. Rew v., 539  
 Ludlam, Doe d. Clarke v., 164  
 Ludlow v. Bunbury, 459  
 Luffingham, Espinasse v., 156  
 Luffman, *In bonis*, 23  
 Lugar v. Harmon, 241, 370  
 Luke, Tyler v., 467  
 Lukin, Curtis v., 443  
 Lumbell, Lumbell v., 45  
 Lumley v. Robbins, 554  
 Lushington v. Onalow, 34  
 Lutkins v. Leigh, 126  
 Lutley, Ackland v., 352  
 Luxford v. Cheek, 398, 406  
 Luxton, Blake v., 72  
   — Doe v., 72  
 Lyall v. Paton, 7  
 Lyddon v. Ellison, 220  
 Lyde, Doe d. Lyde v., 539  
 Lyford, Johnson v., 47  
   — Doe d. Tyrrell v., 97  
 Lyle v. Ellwood, 227  
 Lyles, Battyl v., 46  
 Lyman's Trust, *Re*, 418  
 Lynall's Trusts, *In Re*, 307  
 Lynam, Grant v., 264, 267  
 Lynch, Kevil v., 24  
   — v. Paraguay, Government of, 3  
 Lyne's Trust, *In re*, 217  
   — Estate, *In re*; Sands v. Lyne, 111, 623  
 Lynn, Armstrong v., 600  
   — v. Beaver, 616  
   — v. Kerridge, 145  
 Lyon's Trusts, *In re*, 213  
 Lyon v. Coward, 321  
   — v. Michell, 373  
   — Parnell v., 456  
   — Perrin v., 454  
 Lyons v. Advocate-General of Bengal, 299  
 Lyaght v. Edwards, 169, 170  
 Lytton, Bennett v., 363  
   — v. Lytton, 542, 547  
 Lywood v. Kimber, 271  
  
 MAAS v. Sheffield, 17  
 Maberley's Trusts, 183

- Maberley v. Strobe, 502, 529  
 Maberly, Masterman v., 53, 54  
 M'Alinden v. M'Alinden, 385  
 Macaulay, Wrightson v., 270  
 McBean, Collier v., 336  
 McCabe, *In bonis*, 40  
 McCarogher v. Whieldon, 587  
 M'Cartan, Dowdall v., 130  
 M'Carthy v. M'Carthy, 482  
 M'Causland, Rawson v., 142  
 M'Clenaghan v. Bankhead, 546  
 M'Clure v. Evans, 596  
 M'Conaghy, Campbell v., 631  
 M'Conville v. M'Creesh, 30  
 McCormick v. Grogan, 65  
 M'Creesh, M'Conville v., 30  
 M'Cutcheon v. Allen, 567  
 Macdermot, Dolan v., 290  
 M'Dermot v. O'Connor, 396  
 — White v., 437  
 M'Dermott, Gittings v., 274  
 — v. Wallace, 394  
 Macdonald v. Bryce (2 Kee. 276), 444  
 — v. Bryce (16 B. 581), 509  
 — Cooper v. (16 Eq. 253), 422,  
 506, 555, 596, 597  
 — Cooper v. (7 Ch. D. 289), 466,  
 469  
 — v. Irvine, 103, 105, 111, 199,  
 203  
 — Kermod v., 108, 576, 580  
 — v. Walker, 75  
 Macdoul, Crosbie v., 44, 60  
 Macdonall, Dalhousie, Countess of, v.,  
 4, 5  
 McDowall, *Ex parte*, 631  
 Macdowell, Lake v., 287  
 McDowell, McTear v., 378  
 McEnally v. Wetherall, 324  
 M'Grain, Campbell v., 185, 186  
 Macgregor v. Macgregor, 260, 262,  
 318, 321  
 M'Guire, Ashburner v., 109, 119, 121  
 Machell v. Weeding, 563  
 Machin v. Grindell, 53  
 Macintosh, Young v., 559  
 M'Kechnie v. Vaughan, 242  
 Mackell v. Winter, 573  
 M'Kenna v. Eager, 345  
 Mackenzie v. Bradbury, 574  
 — v. King, 581  
 — v. Mackenzie, 115  
 — Sandeman v., 222  
 Mackett v. Mackett, 385  
 M'Key, *In bonis*, 24, 30  
 Mackie v. Mackie, 201  
 — Walter v., 176  
 Mackilwain, Jones v., 413  
 Mackinley v. Bates, 644  
 — v. Sison, 102, 176  
 Mackinnon, Arthur v., 101  
 — v. Peach, 483  
 — v. Sewell, 483  
 Mackintosh v. Townsend, 310  
 Macklestone v. Brown, 616  
 Mackworth v. Hinxman, 439, 553  
 M'Lachlan v. Taitt, 409, 421  
 Maclaren v. Stainton (3 D. F. & J.  
 202), 134, 644  
 — v. Stainton (27 L. J. Ch. 442;  
 4 Jur. N. S. 199), 156  
 — v. Stinton (4 Eq. 448; 11 Eq.  
 382), 648  
 M'Laughlin, *In re*, 453  
 — Hervey v., 485  
 Macleary, *Re*, 459  
 Macleoth v. Bacon, 267  
 Macloe v. Ewing, 53  
 M'Mahon v. Burchell, 124  
 MacMahon, Shaw v., 606, 608  
 McMurdo, *In bonis*, 52  
 Macnab v. Whitbread, 379  
 M'Neillie v. Acton, 366  
 Macoubrey v. Jones, 223, 224  
 M'Pherson, Allen v., 69  
 Macpherson, Collins v., 520  
 — v. Macpherson, 647  
 Macrae v. Ewing, 55  
 McTear v. McDowell, 378  
 McVicar, *In bonis*, 35  
 Madden v. Iken, 222  
 Maddeson v. Chapman (1 J. & H.  
 470), 85  
 — v. Pye, 626  
 Maddick v. Marks, 177  
 Maddison v. Chapman (4 K. & J. 709;  
 3 De G. & J. 536), 405, 415  
 — Wilson v., 189, 314, 393  
 Maddock, *In bonis*, 23, 30  
 — Allen v., 62  
 — v. Legg, 259  
 Maddy v. Hale, 648  
 Maden v. Taylor, 328, 506, 511, 512,  
 571  
 — Yates v., 391  
 Maggs, Jones v., 446, 448  
 Magill v. Murphy, 636  
 Magrath, Matson v., 57  
 — v. Morehead, 559  
 Maguire, *Re*, 297  
 — Ashburner v., 106  
 — v. Dodd, 9  
 Maher v. Maher, 189, 410  
 Mahon, Dooley v., 209  
 — v. Savage, 295  
 Mahoney v. Donovan, 183, 186  
 Main, Walker v., 520, 521, 523  
 Maine, Malden v., 416  
 Mainwaring v. Beuvor, 137, 247, 248  
 Maitland v. Adair, 602

- Maitland v. Chalie**, 532  
     — **Dewar v.**, 90  
**Majoribanks v. Hovenden**, 9, 11  
**Makeown v. Ardagh**, 121, 296, 297  
**Makin, Walker v.**, 285  
**Malcolm v. Malcolm**, 528  
     — **v. Martin**, 255  
     — **v. O'Callaghan**, 411, 416, 455  
     — **v. Taylor**, 541  
**Malden v. Maine**, 416  
**Malim v. Keighley**, 382, 384  
**Malkin, A.-G. v.**, 370  
**Mallard, Ware v.**, 384  
**Malmesbury v. Malmesbury**, 581  
**Malta v. Malta**, 3  
**Maltby, Cross v.**, 507  
**Manby, Colegrave v.**, 123  
**Manchester & Southport Railway, Re**, 205  
**Manchester, Corporation of, Gee v.**, 488, 489  
**Mandeville's Case**, 272  
     — **Case**; **Allgood v. Blake**, 259  
**Manfield v. Dugard**, 397, 402  
**Mangin v. Mangin**, 147  
**Mangles, A.-G. v.**, 192  
     — **Withy v.**, 275  
**Manifold, Doe v.**, 29  
**Mann v. Burlingham**, 306  
**Mann, Burnet v.**, 15  
     — **v. Copland**, 110  
     — **Debeze v.**, 597  
     — **v. Fuller**, 118, 577  
     — **v. Thompson**, 248  
**Manners, Cocks v.**, 93, 291  
     — **Lord J., Denton v.**, 310  
     — **Lowe v.**, 456  
     — **Earl, Vernon v.**, 618  
**Manning's Case**, 472  
**Manning, Allen v.**, 54  
     — **v. Chambers**, 465  
     — **Mara v.**, 16  
     — **v. Moore**, 546  
     — **v. Purcell** (7 D. M. & G. 55), 144  
     — **v. Purcell** (2 Sm. & G. 284), 150  
     — **v. Spooner**, 618, 620  
     — **v. Taylor**, 325  
     — **v. Thesiger**, 114  
**Mannington, Hutcheon v.**, 525  
**Mannox v. Greener**, 156, 327  
     — **v. Greener**, 630  
**Mansell v. Vaughan**, 357  
**Mansergh v. Campbell**, 393  
**Mansfield, Powys v.**, 597  
**Mantell, Cowper v.**, 119, 121, 386, 604  
**Mapp v. Elcock**, 614  
**Mara v. Manning**, 16  
**Marchant, A.-G. v.**, 300  
     — **v. Cragg**, 218  
**Marchant, Parker v.**, 147, 184, 215  
**Margerum, Hales v.**, 376  
**Margetson v. Hall**, 500  
**Marine Society, Symonds v.**, 304  
**Markham v. Ivatt**, 188, 283  
**Marks, Churchill v.**, 460  
     — **Maddick v.**, 177  
**Marlborough, Duke of, v. Godolphin, Lord**, 602  
     — **Shaftesbury, Earl of, v.**, 118  
**Marlott, Tapner v.**, 273  
**Marples v. Bainbridge**, 454  
**Marriott v. Abell**, 479, 513  
     — **Bunting v.**, 297, 307  
     — **Bussell v.**, 53  
     — **Tollner v.**, 451  
     — **Venes v.**, 216  
**Marsden, In bonis**, 10  
     — **Ballard v.**, 124  
     — **Eyre v.**, 446, 448, 507, 514, 517, 619  
     — **Green v.**, 380, 468  
     — **v. Kent**, 365  
     — **Newton v.**, 454  
**Marsh v. A.-G.**, 297, 803  
     — **v. Marsh** (1 Sw. & T. 528), 22, 24, 31, 60  
     — **v. Marsh** (1 B. C. C. 293), 265  
     — **v. Means**, 296  
**Marshall, Ex parte**, 169  
     — **Bennett v.**, 211  
     — **v. Bousfield**, 557  
     — **v. Bremner**, 200  
     — **v. Crowther**, 646  
     — **v. Hill**, 532  
     — **v. Holloway**, 432  
     — **Upsill v.**, 44  
**Marshfield, Talbot v.**, 369  
**Marson, Theakson v.**, 55  
**Marston v. Doe d. Fox**, 35  
     — **Fox v.**, 57  
     — **v. Roe d. Fox**, 57  
**Martelli v. Holloway**, 439, 553  
**Martin, In bonis** (1 P. & D. 380), 12  
     — **In bonis** (6 N. of C. 694; 1 Rob. 712), 30  
     — **Re**, 18  
     — **Baker v.**, 396  
     — **v. Blake**, 142  
     — **Chellen v.**, 405  
     — **Cooper v.**, 73, 204  
     — **Doe v.**, 165  
     — **Doe d. Lemprière v.**, 155  
     — **Doe d. Templeton v.**, 95  
     — **Doe d. Willis v.**, 423  
     — **Drake v.**, 183  
     — **v. Drinkwater**, 116  
     — **Fullerton v.** (22 L. J. Ch. 893), 158  
     — **Fullerton v.** (1 Dr. & Sm. 31), 647

- Martin v. Glover, 184, 276  
   — Greig v., 209  
   — v. Holgate, 260, 495, 498  
   — v. Laverton, 168  
   — v. Long, 543  
   — Malcolm v., 255  
   — v. Martin (L. R. 1 Eq. 369), 140  
   — v. Martin (L. R. 2 Eq. 404), 525, 526  
   — Moriarty v., 85  
   — Morrison v., 242  
   — Reynish v., 455  
   — v. Smith, 630  
   — Soames v., 396  
   — v. Swannell, 331  
   — Townsend v., 105  
   — Turner v., 603  
   — v. Wellsted, 307  
   — d. Western v. Mawlin, 167  
   — Young v., 381  
 Martindale, Taylor v., 388  
 Martineau v. Briggs, 577  
   — v. Rogers, 411, 490  
 Marwood v. Turner, 122  
 Maskell v. Farrington, 630  
 Maskelyne, Barclay v., 577  
 Mason, *In re*; Mason v. Robinson, 637  
 Mason's Will, *Re*, 148, 605  
 Mason v. Baker, 241  
   — v. Clarke, 314  
   — Hyde v., 38  
   — Maugham v., 196  
   — v. Robinson, 637  
   — Trestrail v., 133  
 Massey, Egerton v., 161  
   — Evans v., 231, 237  
   — v. Hudson, 545  
   — Lees v., 265  
 Massie, Abbot v., 208  
 Masson, Stevenson v., 7, 595, 596  
 Massey v. Rowen, 468, 469  
 Master, Hoy v., 375, 381  
 Masterman, Harbin v., 447  
   — v. Maberly, 53, 54  
 Masters v. Hooper, 264  
   — v. Masters, 208  
   — v. Scales, 498  
 Mather v. Scott, 309  
   — v. Thomas, 148  
 Mathews v. Gardiner, 532  
   — v. Keble, 445, 446, 630  
   — Lewis v., 468  
 Mathias, *In bonis*, 61  
 Matson v. Magrath, 57  
 Matthew, Pratt v. (22 B. 239), 216, 229, 233, 238  
   — Pratt v. (8 D. M. & G. 522), 527  
 Matthews, Dilley v., 232  
   — v. Foulshaw, 242  
   — v. Gardiner, 323  
   — Hoekins v., 6  
   — Lewis v. (L. R. 2 Eq. 177), 169  
   — Lewis v. (L. R. 8 Eq. 277), 287  
   — v. Matthews (4 Eq. 278), 167  
   — v. Matthews (2 Vea. sen. 635), 593  
   — v. Paul, 221  
   — Picken v., 436  
   — Powis v., 422  
   — v. Warner, 55  
   — v. Windross, 326  
 Mattingley's Trusts, 175  
 Mattison v. Tanfield, 277  
 Maude, Benson v., 138  
   — v. Maude, 491  
 Maudsley, Monk v., 159  
 Maugham v. Mason, 196  
   — v. Vincent, 279  
 Maughan, Sopwith v., 88  
 Maule, Rogers v., 612  
   — Rutherford v., 53  
   — Stone v., 532  
 Maunde, Walter v., 263  
 Maunsell, Batteste v., 206  
 Mawbey, Hookley v., 332, 539  
 Maxton, *Re*, 267  
 Maxwell's Will, *Re*, 375  
 Maxwell, Ellis v., 444, 448  
   — v. Hyslop, 90, 131  
   — v. Maxwell (16 B. 106; 2 D. M. & G. 705), 90  
   — v. Maxwell (L. R. 2 Eq. 478), 287, 604  
   — v. Maxwell (L. R. 4 H. L. 506), 629  
 May, *In bonis*, 59  
   — v. Bennett, 636  
   — v. Grove, 147  
   — Hall v., 75  
   — Hatton v., 389  
   — v. Potter, 140  
   — v. Street, 612  
 Maybank v. Brooks, 601  
 Maybery v. Brooking, 149  
 Maybury, Bird v., 413  
 Mayd v. Field, 589, 624  
 Mayer v. Townshend, 378  
 Mayhew, *In re*; Rowles v. Mayhew, 627  
   — Rowles v., 627  
 Mayn v. Mayn, 321  
 Maynard, Leacroft v., 118  
   — v. Wright, 581  
 Mayne, Bayle v., 55  
   — Williams v., 83  
 Mayor, Wilson v., 380  
 Mayott v. Mayott, 259

- Mazarine, Deerly v., 18  
 Meacher v. Young, 368  
 Mead, Beaucherk, Ltd., v., 577  
 — Garland v., 71, 164  
 Meade's Trusts, *In re*, 261  
 Meade v. Hyde, 639  
 Meadows v. Parry, 481  
 Meads, Taylor v., 16, 74, 466  
 Meagher, Barden v., 393  
 Means, Marsh v., 296  
 Measure v. Gee, 338  
 Medcraft, Hone v., 123  
 Medley, Cundy v., 55  
 — v. Horton, 471  
 — Wood v., 53  
 Medworth v. Pope, 226, 234  
 Mee, Badham v., 396  
 Meech, Bentley v., 531  
 Meedham, Donovan v., 139  
 Meeds v. Wood, 399, 406  
 Megson v. Hindle, 233  
 Meinertzagen v. Walters, 595  
 Mellick v. President of the Asylum,  
 291  
 Mellish, Arrow v., 254  
 — Devisme v., 264  
 — v. Mellish, 332, 333  
 — v. Vallina, 131  
 Mellor, *In re*; Butcher, *Ex parte*,  
 367  
 — Stead v., 379  
 Melsom v. Giles, 516, 517  
 Meluish v. Milton, 69, 215  
 Melville, Preston v., 3  
 Melville, Preston v., 644  
 Mence v. Mence, 615  
 Mendham, Morley v., 201  
 — v. Williams, 522, 523  
 Mercer, *In bonis*, 60  
 Merceron's Trusts, *In re*; Davis v.  
 Merceron, 540  
 Merceron, Davies v., 540  
 Mercers' Co. v. A.-G., 301  
 Merchant Taylors, A.-G. v., 300, 382,  
 398  
 Meredith, *In bonis*, 42  
 Meredith's Trusts, *In re*, 187  
 Meredith v. Farr, 226, 231  
 — v. Heneage, 380, 381  
 — v. Meredith, 341  
 — Trappes v., 465  
 — v. Treffry, 220  
 — Woodhouse v., 167  
 Meredyth v. Meredyth, 179  
 Merest v. James, 344  
 Merlin v. Blagrove, 436  
 Merrick's Trusts, 498, 499  
 Merrick, Waksham v., 391  
 Merrill v. Morton, 257  
 Merritt, *In bonis*, 42  
 Merritt, Perry v., 460, 473  
 — Powell v., 612  
 Merry v. Hill, 410, 411, 414  
 Merryman, Elliot v., 364  
 Messeena v. Carr, 389  
 Messenger, Middleton v., 246  
 Metcalfe v. Hutchinson, 634  
 Metham v. Devonshire, Duke of, 231,  
 234, 238  
 Meure v. Meure, 557  
 Meux, Baggett v., 469, 470  
 Meyer, Ancaster, Duke of, v., 126  
 — Booth v., 450  
 — v. Simmenson, 200  
 — v. Simonsen, 647  
 — v. Townshend, 604  
 Meyrick, Cleveland, Duchess of, v.,  
 150  
 — Garth v., 210  
 — v. Laws, 549  
 Miall v. Brane, 88  
 Michael's Trusts, *In re* (46 L. J. Ch.  
 651), 431  
 Michel's Trusts, *In re* (28 B. 39),  
 292  
 Michell v. Bridges, 281  
 — Jefferies v., 210, 594  
 — Lyon v., 373  
 — v. Michell, 184, 641  
 — Onalow v., 591  
 — Quedsted v., 272  
 — v. Wilton, 637  
 Micklethwait, Astley v. (15 Ch. D.  
 59), 245, 475, 624  
 — v. Micklethwait, 549  
 Mico, Haynes v., 593  
 Middlehurst, Hart v., 560  
 Middlesex Hospital, Kerr v., 391,  
 392  
 Middleton, *In bonis* (33 L. J. P. 16),  
 31  
 — *In bonis* (3 Sw. & T. 583), 36,  
 38  
 — Abbott v., 588  
 — v. Clitheroe, 310  
 — Colville v., 110, 638  
 — Crofts v., 336  
 — Cust v., 155  
 — Early v., 114, 240  
 — v. Losh, 446  
 — v. Messenger, 246  
 — v. Middleton, 126  
 — v. Pollock; Nugee, *Ex parte*,  
 124  
 — v. Spicer, 614  
 — v. Windross, 83  
 Midland Railway Co., *In re*, 98  
 — Steele v., 155  
 Mildmay, Selwood v., 102  
 Miles v. Dyer, 531

- Miles, Goodtitle d. Daniel *r.*, 163  
   — *v.* Harford, 436  
   — *v.* Harrison, 625, 629  
   — *v.* Harford, 558  
   — *v.* Miles, 123  
 Mill, A.-G. *r.*, 310  
   — *v.* Mill, 316  
 Millar *v.* Woodside, 102  
 Millard *v.* Bailey, 96, 101, 105  
 Miller, Abney *r.*, 122  
   — *v.* Chapman, 491  
   — *v.* Hanley, 552  
   — *v.* Harris, 79  
   — *v.* Huddleston (6 Eq. 65), 113  
   — *v.* Huddleston (17 Sim. 71; 3 Mac. & G. 513), 620, 622, 637  
   — *v.* James, 67  
   — *v.* Little, 106  
   — *v.* Miller, 201  
   — *v.* Paris *v.*, 325  
   — *v.* Thurgood, 86  
   — *v.* Travers, 100  
   — *v.* West *v.*, 522  
 Milligan, *In bonis*, 52  
 Milliner *v.* Robinson, 332  
 Millington, Torrens *v.*, 189, 190  
 Mills, Alexander *r.*, 357  
   — *v.* Brown, 112  
   — *v.* Drewitt, 636  
   — *v.* Farmer, 299  
   — *v.* Farmer *v.*, 623  
   — *v.* Hamilton *v.*, 273  
   — *v.* Howarth *v.*, 234, 235  
   — *v.* Joel *v.*, 462  
   — *v.* Mills, 201  
   — *v.* Norris, 137  
   — *v.* Roberts, 142  
   — *v.* Seward, 339  
   — *v.* Vivian *r.*, 416  
 Milltown, Earl of, *v.* French, 138  
 Milne *v.* Gilbert, 276  
   — *v.* Travis *v.*, 366  
   — *v.* Walker *v.*, 305  
   — *v.* Wood, 228  
 Milner, A.-G. *v.*, 608  
   — *v.* Slade *v.*, 484  
 Milnes *v.* Aked, 255  
   — *v.* Slater, 614, 617, 639  
 Milroy *v.* Milroy, 415  
 Milsom *v.* Awdry, 505, 517, 554  
   — *v.* Giles *v.*, 554  
 Milsome *v.* Long, 160  
 Milton, Meluish *v.*, 69, 215  
 Miner *v.* Baldwin, 390, 636  
 Minit, Hatfield *v.*, 595  
 Minnethorpe, Gray *v.*, 641  
 Minors *v.* Pattison, 194, 525, 526  
 Minshull, Bernard *v.*, 188, 379, 380  
   — *v.* Minshull, 338, 342  
 Minter *v.* Wraith, 281  
 Minton *v.* Minton, 394  
 Mirehouse, Cooke *r.*, 530  
 Miskelly, *In bonis*, 12, 67  
 Mitchell's Estate, *In re*; Mitchell *v.* Moberly, 306  
 Mitchell *v.* Gard, 22, 69  
   — *v.* Innes *v.*, 393  
   — *v.* Jones *v.*, 195  
   — *v.* Mitchell, 55  
   — *v.* Moberley, 306  
   — *v.* Picard *r.*, 636  
   — *v.* Romans *r.*, 289  
 Mitcheson, *In bonis*, 37  
 Mitford, Pybus *v.*, 335  
   — *v.* Reynolds, 585  
   — *v.* Whicker *v.*, 241  
 Moase *v.* White, 167  
 Moberley, Mitchell *v.*, 306  
 Mocatta *r.* Lindo, 522, 523  
 Mockett, Breton *r.*, 472  
 Moffatt *v.* Burnie, 240, 393  
 Moffett *v.* Bates, 82  
 Mogg *v.* Mogg, 244, 252, 259  
   — *v.* Taylor *v.*, 618  
 Moggridge *v.* Thackwell (1 Ves. jun. 473), 117  
   — *v.* Thackwell (7 Ves. 36), 299, 301  
 Mold, Rodhouse *v.*, 132  
 Mole *v.* Mole, 140  
 Molesworth, Darrel *r.*, 482  
 Mollard, Bagley *r.*, 226, 233  
 Molony *v.* Kennedy, 467  
 Molyneux's Estate, *In re*, 467, 470  
 Monck, Broome *v.*, 204  
   — *v.* Monck, 121, 597  
 Monckton, Glover *v.*, 542  
 Money's Trusts, *In re*, 648  
 Monk *v.* Maudsley, 159  
   — *v.* Peacocke *v.*, 10  
   — *v.* Van Straubenzer *v.*, 60  
 Monkhouse *v.* Monkhouse, 531  
 Monro, Neelson *v.*, 500  
   — *v.* Neilson *v.*, 274  
   — *v.* Styth *v.*, 284  
 Monroe *v.* Coutts, 55  
 Monsell *v.* Armstrong, 356  
 Montagu *v.* Inchiquin, Lord, 553  
   — *v.* Nucella, 493  
   — *v.* Sandwich, Earl of, 146  
 Montague, Bernard *v.*, 526  
 Montefiore *v.* Enthoven, 464  
   — *v.* Guedalla, 595  
   — *v.* Montefiore, 53, 55  
 Montfort, Lord, Gibson *v.*, 634  
 Montgomerie *v.* Woodley, 402  
 Montgomery, *In bonis*, 10, 77  
   — *v.* Elliot *r.*, 631  
   — *v.* Montgomery, 344, 345

- Monypenny v. Dering, 425, 436, 441,  
 442, 477, 549, 550, 569  
 Moon, Harley v., 113  
 Moor v. Denn d. Mellor, 326  
 — v. Raisbeck, 239, 575  
 — Turner v., 484  
 Moore's Settlement Trusts, *Re*, 320  
 Moore v. Budd, 5  
 — Burke v., 23, 28  
 — v. Cleghorn, 328  
 — v. Dixon, 626  
 — Doe d. Hunt v., 403  
 — Fisher v., 511  
 — Friswell v., 53  
 — Johnston v., 201  
 — v. King, 26  
 — Manning v., 546  
 — v. Moore (1 R. 6 Eq. 166), 32  
 — v. Moore (29 B. 496), 120  
 — v. Moore (1 D. J. & S. 602),  
 131  
 — v. Moore (1 B. C. C. 127), 151  
 — v. Moore (1 Coll. 54), 471  
 — Sale v., 379  
 — Scott v., 189  
 — Tennyson v., 224  
 — v. Webster, 466  
 — West v., 151  
 — Whatford v., 418, 419  
 — Williamson v., 257, 258  
 Moores v. Whittle, 633  
 Moorhouse v. Lord, 3  
 — Yarnold v., 465  
 Mordaunt v. Hussey, 615  
 More's Trust, 118  
 Morehead, Magrath v., 559  
 Moreton, Boughey v., 46  
 — Smith v., 132  
 Morgan, *In bonis*, 9, 10, 76  
 — *Ex parte*, 170  
 Morgan's Trusts, *Re*, 287  
 Morgan, Boys v., 188  
 — v. Britten, 318  
 — Davies v., 109  
 — Doe d. Morgan v., 212  
 — Fairfield v., 530  
 — Gatenby v., 480  
 — v. Gronow, 440  
 — Harcourt v., 101  
 — v. Hatchell, 78  
 — Hurry v., 504  
 — Jones v. (1 B. C. C. 206), 336  
 — Jones v. (Ferne C. R. App.  
 577; 3 B. P. C. 322), 547  
 — v. Morgan, 324, 325, 411, 446,  
 449  
 — Ogle v., 215  
 — Powell v., 455  
 — Rickman v., 591  
 — Rowland v., 552  
 Morgan v. Thomas, 120  
 Moriarty v. Martin, 85  
 Morice v. Durham, Bishop of, 291, 298  
 Morland, Kavanagh v., 343  
 — Waite v., 185  
 Morley's Trusts, *In re*, 282  
 — Will, 169  
 Morley v. Bird, 106  
 — Croxon v., 308  
 — v. Hide, 355  
 — v. Mendham, 201  
 — Nash v., 294  
 — v. Rennoldson, 453  
 — v. Tunstall, 619  
 — Wilson v., 149  
 Morony, *In re*, 582  
 Morrall v. Sutton, 578  
 Morrell v. Fisher (4 Eq. 591), 97  
 — v. Fisher (4 De G. & Sm. 422),  
 625  
 — v. Morrell, 52, 53  
 Morrett, Blower v., 621  
 Morrice v. Aylmer, 150  
 — v. Langham, 550, 551  
 Morris, *In re*, 520  
 — Broadhurst v., 333  
 — v. Burton, 143  
 — v. Debenham, 359  
 — Downe, Viscount, v., 612  
 — Dundee, Magistrates of, v., 584  
 585  
 — Ekins v., 149  
 — Fryer v., 121  
 — v. Glyn, 305  
 — v. Hodges, 648  
 — Lewis v., 277  
 — v. Lloyd, 163, 326  
 — v. Morris, 206, 470, 530, 535,  
 543  
 — Venables v., 350, 557  
 — d. Andrews v. Le Gay, 337  
 Morrison v. Hoppe, 158  
 — v. Martin, 242  
 Morrow v. Buah, 638  
 Morse v. Morse, 317  
 — Nathan v., 54  
 — v. Tucker, 630  
 Mortimer v. Hartley, 278, 531  
 — v. West (3 Russ. 370), 226  
 — v. West (2 Sim. 274), 56, 442  
 Mortimore v. Mortimore, 233  
 Mortlock's Trusts, *In re*, 73, 376, 460  
 Mortlock, Peterborough, Bishop of, v.,  
 104  
 — Vivian v., 113  
 Morton & Hallett, *In re*, 75, 355  
 — *In bonis*, 66  
 — Merrill v., 257  
 — Richardson v., 631  
 Moseley, Baker v., 381

- Moseley, D'Almaine *v.*, 158  
   — *Pearks v.*, 438  
 Mosley, Lees *v.*, 343, 345  
 Moss, Alty *v.*, 511  
   — *v. Cooper*, 64, 65  
   — *v. Dunlop*, 280  
   — *v. Harter*, 177  
   — *Packman v.*, 168  
 Mostert, Denysson *v.*, 13  
 Mostyn *v. Brunton*, 413  
   — *v. Champneys*, 162  
   — *Field v.*, 594  
   — *v. Mostyn*, 208  
 Motley, Andrew *v.*, 44  
 Mott, Cherry *v.*, 297  
 Motteux, Durour *v.*, 196  
 Mottram, *Re*, 402  
 Moulson *v. Moulson*, 588  
 Mounsey *v. Blamire*, 273  
 Mount, Burton *v.*, 201  
   — *Skipper v.*, 419  
   — *Wilson v.*, 421  
 Mountfield, Sherratt *v.*, 257  
 Mousley, Gresley *v.*, 72  
 Mowbray, Rayner *v.*, 264, 282  
 Mower's Trusts, *In re*, 627  
 Mower *v. Orr*, 192, 605  
   — *Walker v.*, 410, 417, 540  
 Mowlem's Trust, 136  
 Mowlin, Martin d. Western *v.*, 167  
 Moxom, Sibthorp *v.*, 602  
 Moyle's Estate, *In re*, 334  
 Moysey, Ripley *v.*, 626  
 Muggeridge, *Re*, 464  
 Muggeridge's Trust, 466  
 Mulgrave, Lord, Doe d. Phipps *v.*,  
   536  
 Mullally *v. Walsh*, 157, 182, 183  
 Mullen *v. Bowman*, 382  
 Mullineux, Turner *v.*, 143  
 Mullings, Barwick *v.*, 11, 55  
 Mullins *v. Smith*, 106, 153, 185  
 Munford, Gude *v.*, 143  
   — *Richards v.*, 46  
 Munby, A.-G. *v.*, 311  
 Munday, Harper *v.*, 126, 635  
   — *Leeds, Duke of, v.*, 169  
 Mundy, *In bonis*, 10  
   — *Church v.*, 163  
   — *v. Howe, Earl*, 368  
   — *Weddell v.*, 531  
 Munkittrick, Ridgeway *v.*, 261  
 Munn, Ashworth *v.*, 303  
 Munro *v. Munro*, 4, 5  
 Munroe *v. Douglas*, 5, 8  
 Munt *v. Glynes*, 559  
 Munton, Byam *v.*, 196  
 Murkin *v. Phillipson*, 417  
 Murphy, *In bonis*, 30  
   — *Creagh v.*, 380  
 Murphy *v. Donegan*, 281  
   — *v. Donnelly*, 160  
   — *v. Johnston*, 333  
   — *v. Lineham*, 451  
   — *Magill v.*, 636  
 Murray *v. Addenbrook*, 534, 544  
   — *v. Johnstone*, 576  
 Murrell, Hartland *v.*, 632, 633  
 Murthwaite *v. Jenkinson*, 348  
 Muschamp *v. Bluett*, 459  
 Muskett *v. Eaton*, 404  
 Must *v. Sutcliffe*, 54  
 Muswell Hill Land Co., Rhodes *v.*, 453  
 Mutch, Rogers *v.*, 248  
 Myers *v. Perigal*, 305  
 Mytton *v. Mytton*, 108  
  
 NANFAN *v. Legh*, 329  
 Napier, A.-G. *v.*, 6  
   — *v. Napier*, 171  
 Napper *v. Sanders*, 476  
 Nash *v. Coates*, 338  
   — *Hardacre v.*, 152  
   — *v. Morley*, 294  
   — *Swift v.*, 55  
 Nathan *v. Morse*, 54  
 Naylor *v. Arnitt*, 365  
   — *Christopherson v.*, 496  
   — *Harrison v.*, 557  
   — *v. Robson*, 509  
   — *Williamson v.*, 603  
 Nazer, Wade *v.*, 44  
 Neale, Hobgen *v.*, 259, 262, 493, 494,  
   499, 500, 501  
 Neame, Hammond *v.*, 385  
 Neate *v. Pickard*, 59  
 Neathway *v. Read*, 508, 509  
 Neave's Estates, *In re*, 358  
 Needham, Coates *v.*, 397  
   — *Donovan v.*, 140  
 Needs, Doe d. Gord *v.*, 210, 211  
 Neeld *v. Neeld*, 214  
 Neilson *v. Monro*, 500  
 Neighbour *v. Thurlow*, 393, 569  
 Neild, Plumb *v.*, 644  
 Neilson *v. Monro*, 274  
 Nelley's Trusts, *In re*, 556  
 Nelligan, Nowlan *v.*, 485  
 Nelma, Anstee *v.*, 95  
 Nelson, *In bonis*, 46  
   — *In re*, 34, 39  
   — *v. Callow*, 433  
   — *v. Carter*, 106, 109  
   — *v. Hopkins*, 167  
   — *v. Page*, 129, 131  
   — *Stoddart v.*, 258  
 Nenny, Langham *v.*, 171  
 Neo *v. Neo*, 289, 430



- Nepean, Antrobus *v.*, 55  
 Nethersole *v.* Indigent Blind, School for the, 311  
 Netherwood, Wright *v.*, 57  
 Nettleton *v.* Stephenson, 448  
 Neville, Doe d. Snape *v.*, 579  
 Nevill *v.* Boddam, 40, 507, 511, 577  
   — *v.* Nevill, 386  
 Neville, Shaw *v.*, 28  
 Nevin, Drysdale *v.*, 596  
 Nevinson *v.* Lennard, Lady, 146  
 New *v.* Bonaker, 301  
 Newbegin *v.* Bell, 618  
 Newberry's Trusts, *In re*, 198  
 Newberry, Starr *v.*, 281  
 Newbery, Burton *v.*, 63  
 Newbold *v.* Roadknight, 110  
 Newbolt, Pryce *v.*, 213  
 Newburgh *v.* Newburgh, 582  
 Newcastle, Duke of, Lincoln, Countess of, *v.*, 553  
 Newcombe, Vincent *v.*, 201  
 Newcome, Turvin *v.*, 433  
 Newell, Doe d. Roake *v.*, 403  
   — Palmer *v.*, 177  
 Newill *v.* Newill, 314, 385  
 Newland, Cursbam *v.*, 517  
   — *v.* Shephard, 568  
   — Tribe *v.*, 510  
 Newman, *In bonis*, 29  
   — Abrey *v.*, 255  
   — *v.* Bateson, 139  
   — Jones *v.*, 210, 211  
   — *v.* Newman, 145, 182  
   — *v.* Nightingale, 316  
   — *v.* Piercey, 243  
   — *v.* Wilson, 131  
 Newmarch, *In re*; Newmarch *v.* Storr, 132, 133  
 Newns, *In bonis*, 10  
 Newsome *v.* Bowyer, 18  
 Newsom's Trusts, 317  
 Newstead *v.* Johnson, 616  
 Newton's Trusts, *In re*, 274  
 Newton *v.* Clarke, 29  
   — Harris *v.*, 275, 378  
   — *v.* Lucas, 98  
   — *v.* Marsden, 454  
   — *v.* Newton, 43, 60  
   — Ridge *v.*, 101, 147  
   — Warren *v.*, 152  
   — Wingfield *v.*, 189  
 Niblock *v.* Garrett, 216  
 Nicholl, Wigg *v.*, 628  
 Nicholla, Cooney *v.*, 152  
   — Doe d. Player *v.*, 349  
   — *v.* Hawkes, 390  
   — Hoaking *v.*, 105, 106  
   — *v.* Nicholls, 11  
 Nichols, Binns *v.*, 627  
   — *v.* Haviland, 276, 603  
   — *v.* Hooper, 543  
 Nicholson's Estate, *In re*, 390  
 Nicholson, Hartshorn *v.*, 308  
   — Stockdale *v.*, 285, 286  
   — *v.* Wilson, 285  
 Nickison *v.* Cockhill, 629  
 Nicks, *In bonis*, 23  
 Nickson, Parker *v.*, 270  
 Niclosen *v.* Wadsworth, 355  
 Nicolay, Jones *v.*, 10  
 Nightingale, Barnacle *v.*, 537  
   — *v.* Goulbourne, 290  
   — *v.* Lawson, 649  
   — Newman *v.*, 316  
 Nixon, Richardson *v.*, 387  
 Noble, Bessant *v.*, 643  
   — Gallini *v.*, 102  
   — Jackson *v.*, 478  
   — Willock *v.*, 15, 17  
 Nockolds *v.* Locke, 255  
 Noden, Cordell *v.*, 109  
 Noel *v.* Henley, Lord, 642  
   — *v.* Jones, 386  
   — *v.* Noel, 639, 643  
 Norbury, *In re*, 79  
 Norcott *v.* Gordon, 621  
 Norfolk's Case, Duke of, 427  
 Norman's Trusts, 279  
 Norman *v.* Kynaston, 377  
   — *v.* Norman, 250  
 Norreys *v.* Franks, 122, 196  
 Norrington, *In re*; Bundley *v.* Part-  
   ridge, 365  
 Norris *v.* Chambres, 18  
   — Mills *v.*, 137  
   — *v.* Norris, 122  
 North, Hand *v.*, 321  
   — Kidd *v.*, 115  
   — Price *v.*, 632  
   — Lord, *v.* Purdon, 615  
   — Wadley *v.*, 413  
 Northcote, Incledon *v.*, 140  
   — Skrymaher *v.*, 190, 626  
 Northumberland, Duke of, A.-G. *v.*,  
   295  
   — Duke of, Jervoise *v.*, 557  
 Norton *v.* Bazett, 29  
   — Davis *v.*, 477  
   — Lowndes *v.*, 646  
   — Rippon *v.*, 463  
   — Simmons *v.*, 645  
 Norwood, Crump d. Woolley *v.*, 338  
 Nosworthy, *In bonis*, 11  
 Noton, Slatter *v.*, 122  
 Nott's Trusts, *Re*, 255  
 Nottidge, Shepherd *v.*, 381  
 Nottley *v.* Palmer, 88  
 Nourse *v.* Finch, 615

- Nowell, Beaver *v.*, 331, 373, 573  
 Nowlan *v.* Nelligan, 485  
   — *v.* Walsh, 375  
 Noyes, Knapp *v.*, 490  
 Nucella, Montagu *v.*, 493  
 Nugée *v.* Chapman, 184, 598  
 Nugent, Lord, Clayton *v.*, 96, 208  
   — *v.* Nugent, 574  
 Nunn's Trusts, 214  
 Nurton, Buck d. Whalley *v.*, 155
- OAKES *v.* Oakes**, 120, 150  
   — Rede *v.*, 359  
 Oakley, Sherratt *v.*, 574  
   — *v.* Wood, 320  
 Oakman, Hetherington *v.*, 422  
 Oates *v.* Jackson, 334  
   — d. Hatterly *v.* Jackson, 315  
 O'Callaghan, Malcolm *v.*, 411, 416, 455  
 Occleston *v.* Fullalove, 233, 234, 236, 238  
 Oceanic Steam Navigation Co. *v.* Sutherland, 366  
 O'Connor *v.* Haslam, 630  
 O'Connor, M'Dermot *v.*, 396  
 Oddie *v.* Brown, 433, 619  
   — *v.* Woodford, 271  
 Odell, Crone *v.*, 246, 250, 573  
 Odling, Poole *v.*, 86  
 O'Donnell *v.* O'Donnell, 96  
 O'Donohoe *v.* King, 545  
 O'Dwyer *v.* Geare, 66, 67  
 Offen *v.* Harman, 365  
 Oglander, Glynn *v.*, 10  
   — Harmood *v.*, 620  
   — Hood *v.*, 459  
 Ogle *v.* Corthorn, 315, 316, 317  
   — Jones *v.*, 135  
   — *v.* Knipe, 144, 148  
   — *v.* Morgan, 215  
 O'Hara *v.* Chaine, 88  
 Oke *v.* Heath, 187, 604  
 Old, Tickner *v.*, 193  
 Oldfield, Bentley *v.*, 325  
 Oldham *v.* Oldham, 464  
 Olding, *In bonis*, 26  
   — Lee *v.*, 423  
 Oldman *v.* Slater, 615  
 O'Leary *v.* Douglass, 42  
   — Wilson *v.* (12 Eq. 525; 7 Ch. 448), 115, 117  
   — Wilson *v.* (17 Eq. 419), 620  
 Olivant *v.* Wright (9 Ch. D. 646), 325  
   — *v.* Wright (1 Ch. D. 346), 487  
 Oliveira, Beaumont *v.*, 290, 629  
 Oliver, Hixon *v.*, 375
- Oliver Massey, Dawson *v.*, 451, 459  
   — *v.* Oliver (11 Eq. 506), 106  
   — *v.* Oliver (10 Ch. D. 765), 559  
   — Sloper *v.*; Batchelor, *In re*, 124  
   — Smith *v.*, 310  
 Ollatt, Paske *v.*, 20  
 Ollive, Weale *v.*, 375, 376  
 Olney *v.* Bates, 422, 605  
 O'Mahoney *v.* Burdett, 478, 486  
 Ommaney *v.* Bingham, 5  
   — *v.* Butcher, 144, 188, 291, 298, 616  
   — Butler *v.*, 373, 497  
 O'Neill, Donnellan *v.*, 118, 296  
   — Johnson *v.*, 141  
 Ong Ching Neo, Yeap Cheah Neo *v.*, 267, 291, 294  
 Ongley *v.* Chambers, 156  
 Onions *v.* Tyrer, 37, 38, 46, 577  
 Onslow, *In re*; Barber, *Ex parte*, 367  
   — Allardice *v.*, 7  
   — Lushington *v.*, 34  
   — *v.* Michell, 591  
   — Romaine *v.*, 589  
   — *v.* Wallis, 612  
 Oppenheim *v.* Henry, 247  
 Orange *v.* Pickford, 74  
 Ord, *In re*; Dickinson *v.* Dickinson, 162  
   — *In re*; Dickinson *v.* Ord, 396  
   — *v.* Ord, 555  
 Ordish, Wood *v.*, 620  
 Orlebar's Settlement, *Re*, 421  
 Ormerod *v.* Riley, 480  
 Orpen, *In re*; Beswick *v.* Orpen, 124  
   — Beswick *v.*, 124  
 Orr, Mower *v.*, 192, 605  
   — West *v.*, 497  
 Orrell *v.* Orrell, 90  
 Orrery, Lord, Sheffield *v.*, 399  
 Orton's Trust, *In re*, 254, 498  
 Osborn *v.* Brown, 490  
 Osborne, Hoare *v.* (L. R. 1 Eq. 585), 291, 292, 298  
   — Hoare *v.* (12 W. R. 661; 33 L. J. Ch. 586; 10-Jur. N. S. 694), 180, 607  
   — Hutchin *v.*, 177  
   — *v.* Leeds, Duke of, 116  
   — Pruen *v.*, 260  
   — *v.* Rowlett, 75  
   — Smith *v.*, 504  
 Osbourn, Woodden *v.*, 100  
 O'Sullivan, Talbot *v.*, 382  
 Oswald, *In bonis*, 21  
   — Trotter *v.*, 543  
 O'Toole *v.* Browne, 158  
 Ottey, Baines *v.*, 235  
 Ouseley *v.* Anstruther, 639, 642

- Over, Thwaites *v.*, 263  
 Overbury *v.* Overbury, 56  
 Overhill's Trusts, *Re*, 226, 229, 230  
 Owen's Will, *In re*, 317  
 Owen *v.* Bryant, 232  
   — Craddock *v.*, 612, 614  
   — *v.* Delamere, 366  
   — *v.* Penny, 321  
   — Thorp *v.* (2 Sm. & G. 90), 269  
   — Thorp *v.* (2 Ha. 607), 385  
   — Williams *v.*, 98  
 Owston, *In bonis*, 27  
 Oxenden, Doe d. Chichester *v.*, 96  
 Oxford, Bishop of, A.-G. *v.*, 297  
   — *v.* Churchill, 259  
   — Earl of, Briggs *v.*, 433  
   — Earl of, Walpole, Lord, *v.*, 13,  
     43, 59  
   — University of, *v.* Clifton, 331  
  
 PACK, Collingwood *v.*, 275  
 Pack, Bescohy *v.*, 148  
 Packer *v.* Scott, 436  
 Packington, Wych *v.*, 383  
 Packman *v.* Moss, 168  
 Padbury *v.* Clark, 86  
 Padmore *v.* Whatton, 46  
 Padwick, Bubb *v.*, 526  
 Page, Denn d. Breddon *v.*, 536  
   — *v.* Hayward, 398  
   — *v.* Leapingwell, 106, 110, 113,  
     302  
   — Nelson *v.*, 129, 131  
   — *v.* Page, 601  
   — Price *v.*, 209, 210, 211  
   — *v.* Soper, 370  
   — *v.* Way, 463  
   — *v.* Young, 105, 189  
 Paget *v.* Grenfell, 590  
   — *v.* Huish, 110  
 Paice, Atkinson *v.*, 568  
   — *v.* Canterbury, Archbishop of,  
     301, 304, 578  
 Pain *v.* Benson, 513  
   — Lee *v.*, 95, 114, 117, 208, 210,  
     214, 242, 606  
 Paine *v.* Hyde, 458  
   — *v.* Stratton, 371  
 Painter, Chester *v.*, 139  
 Palin *v.* Brookes, 102  
   — *v.* Hills, 286  
 Palmer's Trust, *In re*, 504  
 Palmer, Cadell *v.*, 424, 434  
   — Congreve *v.*, 255, 492, 496  
   — *v.* Crawford, 388  
   — *v.* Cruttwell, 254  
   — Doe *v.*, 32, 33  
   — Doe d. Shalcross *v.*, 47  
  
 Palmer *v.* Fowler, 386  
   — *v.* Graves, 632  
   — Harvey *v.*, 123  
   — *v.* Newell, 177  
   — Nottley *v.*, 88  
   — *v.* Simmonds, 379  
   — Smith *v.*, 235  
   — Week *v.*, 270  
 Pankhurst *v.* Howell, 597  
 Pannel, Lane *v.*, 245  
 Panopticon, Royal, Clark *v.*, 363  
 Papillon *v.* Papillon, 591  
   — *v.* Voice, 557  
 Paramour *v.* Yardley, 578  
 Pares, Peacocke *v.*, 224  
 Parfitt *v.* Hember, 441, 442  
   — *v.* Lawless, 21  
 Paris *v.* Miller, 325  
   — *v.* Paris, 644  
   — Pieschel *v.*, 300  
 Parish, Drummond *v.*, 52  
 Park, Fairer *v.*, 112, 593  
 Parke, Amphlett *v.*, 195  
 Parker, *In bonis* (2 Sw. & T. 375),  
   52  
   — *In bonis* (1 Sw. & Tr. 523),  
     605  
   — *In re*; Barker *v.* Barker, 415  
   — *In re*; Bentham *v.* Wilson,  
     258  
   — *v.* Birks, 324, 532, 543  
   — *v.* Bolton, 382, 558  
   — Chitty *v.*, 193  
   — Clarke *v.*, 455, 457  
   — Cox *v.*, 612  
   — *v.* Downing, 89  
   — *v.* Fearnley, 633  
   — Goodright d. Revell *v.*, 397  
   — Hudson *v.*, 28  
   — Kelvington *v.*, 579  
   — Lambert *v.*, 140  
   — *v.* Marchant, 147, 184, 215  
   — *v.* Nickson, 270  
   — Press *v.*, 100  
   — Price *v.*, 17  
   — *v.* Sowerby, 88, 417  
   — Sparling *v.*, 335, 372  
   — *v.* Tootal, 496, 537, 563, 582  
 Parkhurst, Smith d. Dormer *v.*, 399  
 Parkin *v.* Bainbridge, 33  
   — Doe d. Parkin *v.*, 97, 100  
   — *v.* Hodgkinson, 519  
   — *v.* Knight, 331, 373  
 Parkinson's Trust, 266  
 Parkyns, Ranccliffe *v.*, 85, 87  
 Parnall *v.* Parnall, 380  
 Parnell, *In bonis*, 78  
   — *v.* Lyon, 456  
 Parnham's Trusts, *In re*, 465  
 Parnther, A.-G. *v.*, 15

- Parr, *In bonis*, 39  
 Parr's Trust, *Re*, 409  
 Parr v. Swindells, 539  
     — Webster v., 544  
 Parratt, Doe v., 322  
 Parrott, Alger v., 283, 370  
     — v. Davies, 414  
     — v. Worsfold, 108  
 Parry, Foley v., 381, 396  
     — Meadows v., 481  
     — Phillips v., 619  
     — v. Roberts, 458  
 Parson, Baker v., 349  
 Parsons, A.-G. v., 307  
     — v. Baker, 381  
     — v. Coke, 373, 386  
     — v. Gulliford, 496  
     — v. Justice, 248, 251  
     — v. Lanoe, 59  
     — v. Parsons (1 Ves. jun. 266), 210  
     — v. Parsons (8 Eq. 260), 274, 331, 388, 393  
     — v. Saffery, 288, 289  
 Partington, Andrews v., 244  
 Partridge, Bundley v., 365  
     — v. Foster, 477  
     — v. Partridge, 104, 120  
 Pascall, *In bonis*, 60  
 Paske, Clements v., 537  
     — v. Haselfoot, 73  
     — v. Ollatt, 20  
 Pasmore v. Huggins, 239  
 Patch, Barnes v., 266, 268  
     — v. Shore, 179  
 Patchell, *In bonis*, 41  
 Patching v. Barnett (28 W. R. 886), 135, 188, 209, 404, 438  
     — v. Barnett (49 L. J. Ch. 665), 438  
 Pater, Collinson v., 305  
 Paternoster, Graham v., 306  
 Paterson v. Rolland, 320  
     — v. Scott, 627  
 Paton, Lyall v., 7  
 Patrick v. Yeatherd, 183  
 Patrickson, Dacre v., 128, 614, 639  
 Patten, *Re*, 4, 5  
     — v. Poulton, 46  
 Pattenden v. Hobson, 274  
 Patterson v. Huddart, 157, 183  
 Pattison, Barstow v., 460  
     — Lowry v., 456  
     — v. Pattison (1 M. & K. 12), 103  
     — v. Pattison (19 B. 638), 252, 570  
 Patton v. Randall, 860  
 Paul v. Children, 229  
     — v. Hewatson, 74  
 Paul, Matthews v., 221  
     — v. Paul, 99  
 Paulin, Kirk v., 467  
 Paull, Browne v., 385  
 Pawlet v. Dogget, 543  
 Pawson v. Pawson, 393  
 Paxton, Cholmeley v., 354  
 Paylor v. Pegg, 477, 567  
 Payne, *In re*, 409, 416  
 Payne, *Ex parte*, 381  
     — *Re*, 460  
     — Carrington, Lord, v., 577  
     — Hagger v., 246  
     — Randall v., 456  
     — v. Trappes, 46, 59  
     — v. Wagner, 218  
 Peach, Lambard v., 548, 550  
     — Mackinnon v., 483  
     — Simpson v., 409  
 Peacock's Estate, *In re*, 597  
     — Trusts, *In re*, 468  
 Peacock, Forbes v., 360, 364  
     — Hodges v., 117  
     — v. Peacock, 620  
     — v. Stockford (3 D. M. & G. 73), 241  
     — v. Stockford (7 D. M. & G. 129), 255  
 Peacocke v. Monk, 10  
     — v. Pares, 224  
 Peagram, Bird v., 467  
 Peake v. Penlington, 561  
 Pearce v. Carrington, 249  
     — Cornick v., 192  
     — v. Edmeades, 255, 395  
     — v. Gardner, 355  
     — v. Graham, 605  
     — v. Loman, 628  
     — Perriman v., 276  
     — v. Vincent, 264  
 Peard v. Kekewich, 430, 445  
 Pearkes, Taniere v., 254  
 Pearks v. Moseley, 438  
 Pearman v. Pearman, 413, 487  
 Pearn, *In bonis*, 25, 28  
 Pearsall v. Simpson, 405  
 Pearse, *In bonis*, 29  
     — v. Baron, 562  
     — Heasman v., 260, 322, 422, 431, 495, 499  
 Pearson, *In bonis*, 28  
     — A.-G. v., 292  
     — Brooke v., 462  
     — Cranswick v., 395  
     — Doe d. Gill v., 459  
     — v. Dolman, 390, 413, 414, 415, 460  
     — Freeland v., 73, 251, 602, 605  
     — Grey v., 528, 529, 531  
     — v. Helliwell, 636

- Pearson v. Pearson (2 P. & D. 451), 28  
 — v. Pearson (1 Sch. & Lef. 10), 137  
 — v. Rutter, 478  
 — v. Spencer, 156  
 — v. Stephen, 253, 373, 498  
 — Sturgess v., 479  
 — Watson v., 349  
 — Wright v., 337  
 Pease, Jackson v., 624, 626  
 Peat v. Chapman, 601  
 — v. Powell, 568  
 Peck, Brown v., 400  
 — v. Halsey, 584  
 Peckett, Field v. (9 W. R. 526), 150  
 — Field v. (29 B. 568), 194  
 — Rownd v., 395  
 Pedley v. Dodds, 97  
 — Hasluck v., 135  
 Pedrotti's Will, *Re*, 376  
 Peek's Trusts, *In re*, 137, 413  
 Peel, *In bonis*, 207  
 — v. Catlow, 495  
 Pegg, Paylor v., 477, 567  
 Peirce, Hampshire v., 243  
 Peixoto, Bradley v., 459  
 Pelham, Clowdsley v., 633  
 — Lincoln, Lady, v., 222  
 Pemberton, Shingler v., 11  
 Pembroke v. Friend, 130, 131  
 Penfold v. Shillingford, 648  
 Penley, Whiteher v., 493  
 Penlington, Peake v., 561  
 Pennant, Blackwell v., 215  
 — v. Kingscote, 26  
 Pennefather v. Pennefather, 173  
 Pennington, Bateman v., 33  
 — Clay v., 373, 496  
 — Hargreaves v., 118, 576  
 — Lowe v., 175  
 Pennock v. Pennock, 474  
 Penny, Briggs v., 379, 609  
 — v. Clarke, 321  
 — Donn v., 373  
 — Holmes v., 463  
 — Owen v., 321  
 — v. Penny, 625  
 — v. Pippin, 375  
 — v. Turner, 491  
 Penoyre, Wood v., 138  
 Penrhyn, J.D., Dawkins v., 429, 460  
 Pentecost v. Ley, 102  
 Penton, Stares v., 599  
 Pepper v. Pepper, 42  
 — Smith v., 263, 495  
 Peppercorn v. Wayman, 356  
 Peppin v. Beckford, 217  
 Peppitt's Estate, *Re*, 273  
 Percival v. Percival, 136, 244, 475, 477  
 Percy, Fairland v., 366  
 — Greenwood v., 503  
 — v. Percy, 637  
 Pereira, Dufour v., 13  
 Perfect, Bree v., 409, 417  
 — v. Curzon, Ld., 420  
 Perigal, Myers v., 305  
 Perkes, Doe v., 44  
 Perkins v. Baynton, 320  
 — Biddle v., 433  
 — Biscoe v., 348  
 — v. Cooke, 636, 637  
 — v. Fladgate, 182, 242  
 — v. Goodwin, 232  
 — Timewell v., 159, 183  
 Ferratt, Doe d. Winter v., 271, 431  
 — Winter v., 270  
 Perriman v. Pearce, 276  
 Perrin v. Blake, 337  
 — v. Lyon, 454  
 Perring, Pomfret v., 177  
 — v. Traill, 311  
 Perrott v. Perrott, 37  
 Perry, Circuit v., 189, 574  
 — Heath v., 139  
 — v. Merritt, 460, 473  
 — Rolfe v., 129  
 — Sibley v., 105, 153, 260  
 Perry, Doe d. Comberbach v., 536  
 Pertwee, Green v., 190  
 Pery v. White, 571  
 Peter v. Stirling, 626  
 Peterborough, Bishop of, v. Mortlock, 104  
 Peters, Abbott v., 63  
 — Blake v., 645  
 — v. Lewes & East Grinstead Railway Co., 359  
 — Louch v., 143  
 — Usticke v., 87  
 Petre v. Petre, 113, 624  
 Pett v. Fellows, 140  
 Pettinger v. Ambler, 179  
 Petty, Salisbury v., 493  
 — v. Wilson, 147  
 Petvin, Aspinall v., 564, 565  
 Pew, Hale v., 433, 442  
 Peyton v. Bury, 399, 450  
 — Dashwood v., 83  
 — Twopenny v., 461  
 Phelps, *In bonis*, 62, 63  
 — Longhead v., 436  
 — Thomas v., 159  
 Phene's Trusts, *In re*, 250, 321  
 Philbrick's Trusts, *In re*, 181  
 Philcox, Burrough v., 570  
 Philipps v. Eastwood, 618  
 Phillips, *In re*; Phillips v. Levy, 448

- Phillips v. Allen, 325  
   — v. Barker, 209  
   — v. Barlow, 646  
   — v. Beal, 472  
   — Brydges v., 640  
   — v. Chamberlayne, 374  
   — Chester v., 273  
   — Clark v., 608  
   — Doe d. Thorne v., 326  
   — Dormer v., 270  
   — v. Evans, 283, 285  
   — Frogley v., 258  
   — v. Garth, 277  
   — v. Gutteridge, 637, 638  
   — Hopkins v., 303  
   — v. James, 560  
   — v. Levy, 448  
   — v. Parry, 619  
   — v. Phillips (1 M. & K. 649), 197  
   — v. Phillips (W. N. 1877, 260), 447, 452  
   — v. Phillips (13 W. R. 170; 10 Jur. N. S. 1173), 496  
   — v. Phillips (3 Ha. 281), 603  
   — v. Phillips (8 B. 193), 633  
   — Read v., 53  
   — Roberts v., 29  
   — v. Sargent, 648  
   — Stringer v., 509  
 Phillipsson, Murkin v., 417  
 Philpot, *In bonis*, 27  
 Philpott v. St. George's Hospital, Governors of, 310  
 Philp's Will, 492, 495  
 Phipps, *In bonis*, 52  
 Phipps v. Ackers, 137, 403, 404  
   — v. Hale, 30  
   — v. Kelynge, 444  
 Phyn, Bell v., 527, 529  
 Picard v. Mitchell, 636  
 Pickard, Neate v., 59  
 Picken v. Matthews, 436  
 Pickering v. Pickering, 201  
   — v. Stamford, Ltd., 603, 611  
   — Stamper v., 636, 637  
 Pickersgill v. Grey, 245  
   — v. Rodger, 81  
 Pickford v. Brown, 626  
   — Lister v., 155  
   — Orange v., 74  
 Pickup's Will, *Re*, 239  
 Pickup v. Atkinson, 202  
   — Grimshawe v., 531  
 Pickwell v. Spencer, 326  
 Pickwick v. Gibbs, 139  
 Pidgely v. Pidgely, 173  
   — v. Rawling, 645  
 Pierce v. Locke, 588  
 Piercey, Newman v., 243  
 Piercy, *In bonis*, 29  
   — v. Roberts, 462  
 Pierson v. Garnet, 381, 384  
   — v. Vickers, 338  
 Pieschel v. Paris, 300  
 Pigg v. Clarke, 266  
 Piggott, Fraser v., 229, 230  
   — v. Green, 287  
   — v. Wildes, 555  
   — Wilson v., 600  
 Pigott, Doe d. Dell v., 97  
 Pilcher, Boulton v., 418  
 Pile, Curry v., 114  
   — Hayward v., 648  
   — Stevens v., 222, 421  
 Pilkington's Trusts, 103, 120  
 Pillans, Home v., 490  
 Pinbury v. Elkin, 543  
 Pinchin v. Simms, 593, 594  
 Pinder v. Pinder, 232  
 Pinède's Settlement, *In re*, 180  
 Pinney v. Hunt, 68  
 Pinniger, Gundry v., 275, 283  
 Piper v. Piper, 129  
   — Wise v., 561  
 Pippin, Penny v., 375  
 Pistol v. Riccardson, 165  
 Pitcairne v. Brase, 210  
 Pitcher, Cooper v., 568  
   — Dummer v., 72, 86  
 Pitman v. Stevens, 152, 159  
 Pitt's Will, *Re*, 215, 216  
 Pitt v. Jackson, 335, 441  
   — v. Pitt, 6  
   — Simmons v., 609  
   — Tothill v., 371  
 Plaskett, Willis v., 146, 500  
 Platel, Stert v., 264  
 Platt v. A.-G. of New South Wales, 7  
   — Eckersley v., 38, 46  
   — v. Powles, 331  
   — Stead v., 409, 503  
 Playfair v. Cooper, 637  
 Playfoot, Cramp v., 310, 585  
 Playford v. Hoare, 350  
 Payne v. Scriven, 24  
 Plenty v. West (2 Phillim. 264), 42  
   — v. West (6 C. B. 201; 16 B. 175), 346  
 Plowright, Scoular v., 20  
 Plumbe v. Neild, 644  
 Plummer, Bulteel v., 173  
 Plumptre, Doe v., 278  
 Plunket v. Holmes, 336  
   — v. Reilly, 613  
 Plunkett v. Lewis, 592  
 Pocock v. A.-G., 299  
   — Brown v., 251  
   — Chandler v., 178

- Pocock, Roberts v., 106  
 Pogson v. Thomas, 98, 158  
 Poilblanc, Androvin v., 614  
 Polden v. Bastard, 156  
 Pole v. Somers, Ltd., 83  
 Polhill, Ware v., 433  
 Pollard's Estate, *In re*, 828  
     — Trusts, *Re*, 327  
 Pollard, Cofield v., 179  
     — Drewett v., 446  
 Polley v. Polley, 269  
     — v. Seymour, 193  
 Pollock v. Booth, 431  
     — Kelly v., 322  
     — Middleton v.; Nugee, *Ex parte*, 124  
     — v. Pollock, 135  
 Pomfret v. Perring, 177  
 Pond, Jervis v., 496  
 Pontet, Beveze v., 593  
 Poole v. Bott, 408, 453  
     — v. Heron, 110  
     — v. Odling, 86  
     — v. Poole (3 B. & P. 620), 341  
     — v. Poole (7 Ch. 17), 598, 599, 630  
     — Steedman v., 470  
 Pope, Agnew v., 577  
     — Medworth v., 226, 234  
     — v. Pope (14 B. 593), 260  
     — v. Pope (10 Sim. 1), 379  
     — v. Whitcombe (3 Mer. 689), 264, 265  
     — v. Whitcombe (3 Russ. 124), 511  
 Popham v. Aylesbury, Lady, 151  
     — v. Bampffield, 399  
     — Fischer v., 28  
 Popple v. Cunison, 54  
 Porcher v. Wilson, 131  
 Portarlington, Earl of, v. Damer, 622, 630  
 Porter, *In bonis*, 11  
 Porter's Trusts, *In re*, 604  
     — Trusts, 493  
 Porter v. Baddeley, 201  
     — v. Fox, 436  
     — v. Fry, 451  
     — v. Tournay, 150  
 Portington, R. v., 293  
 Portland, Countess of, v. Prodgers, 18  
     — Duke of, Bentinck v., 438  
 Postlethwaite, Warren v., 626  
 Potinger v. Wightman, 4  
 Potter's Trusts, *In re*, 497  
 Potter v. Baker, 392  
     — Bibbens v., 473, 484  
     — Hope v., 582  
     — Kirby v., 106  
     — May v., 140  
 Potter v. Richards, 454  
 Potts v. Atherton, 413  
     — v. Britton, 463  
     — Fenwick v., 352  
     — v. Potts, 553  
     — v. Smith, 621  
 Poulden, A.-G. v., 444, 448, 636  
     — Snow v., 402  
 Poulett, Earl, v. Hood, 149  
 Poulteney, Cavan, Lady, v., 84  
     — Garden v., 317  
 Poulton, Allen v., 164  
     — Patten v., 46  
 Pound, Vickers v., 109, 150  
 Powell's Trusts, *In re* (39 L. J. Ch. 188), 440  
     — Trust (Jo. 49), 147  
     — Trust, *Re* (18 W. R. 228; 39 L. J. Ch. 188), 177  
 Powell, *Re*, 146  
     — v. A.-G., 294  
     — Auster v., 598  
     — v. Boggis, 274, 372  
     — Chester v., 126  
     — v. Davies, 219  
     — v. Hellicar, 9  
     — v. Howells, 571  
     — v. Merritt, 612  
     — v. Morgan, 455  
     — Peat v., 568  
     — v. Powell (1 P. & D. 209), 38  
     — v. Powell (28 L. T. N. S. 730), 254  
     — v. Rawle, 451  
     — Rawlins v., 592  
     — v. Riley, 111, 642  
     — Robertson v., 579  
     — v. Robins, 632  
     — Twining v., 597  
 Power, Burton v., 326  
     — Hartford v., 468  
     — v. Hayne, 389  
     — v. Power, 129  
     — v. Quealy, 277  
     — Richardson v., 519  
     — Smyth v., 538  
 Powerscourt v. Powerscourt, 290  
 Powis v. Burdett, 416, 419  
     — v. Matthews, 422  
 Powles, Platt v., 331  
 Powlett, Kelly v., 150  
 Pownall v. Graham, 439  
     — Griffith v., 437  
 Powys Keck, Lilford, Lord, v., 162, 628  
     — v. Mansfield, 597  
 Poynder, Hinxman v., 381  
 Poyner, Harris v., 202  
 Poyntz, Fonnereau v., 108, 623  
 Pratt v. Harvey, 307

- Pratt, Hoste v., 247, 368  
   — v. Jackson, 150  
   — v. Matthew (22 B. 328), 216,  
     229, 233, 238  
   — v. Matthew (8 D. M. & G. 522),  
     527  
   — v. Pratt, 43  
   — v. Sladden, 614, 616  
   — Winson v., 39, 44  
 Preece, Steed v., 206  
 Prendergast, Gabb v., 226, 227  
   — v. Prendergast, 624  
 Prentice v. Brooke, 373  
 Prescott v. Barker, 166  
   — Campbell v., 184  
   — Forrest v., 638  
   — Holmes v., 136, 404  
 President of the Asylum, Mellick v.,  
   291  
 Press v. Parker, 100  
 Preston, Fielding v., 111  
   — Holder v., 356  
   — Jerny v., 206  
   — v. Melvill (8 Cl. & F. 1), 3  
   — v. Melville (16 Sim. 163), 644  
   — v. Preston, 623  
 Prevost v. Clarke, 381, 384  
 Price v. Anderson, 644  
 Price, A.-G. v. (3 Atk. 109), 294  
   — A.-G. v. (17 Ves. 371), 295  
   — Chandless v., 371  
   — Curtis v., 335, 351  
   — v. Dewhurst, 3  
   — Franks v., 405, 539  
   — Greaves v., 41, 76  
   — v. Hall (5 Eq. 399), 244, 403,  
     404, 475  
   — Jones v., 263  
   — v. Lockley, 500  
   — v. North, 632  
   — v. Page, 209, 210, 211  
   — v. Parker, 17  
   — v. Price, 45  
 Prichard v. Ames, 467  
 Pride v. Bubb, 16  
   — v. Fooks (2 B. 430), 445  
   — v. Fooks (3 De G. & J. 252),  
     540  
 Prideaux, Sweeting v., 554  
 Pridham, Luckcraft v. (48 L. J. Ch.  
   636), 624, 626, 628, 641  
   — Luckcraft v. (6 Ch. D. 205),  
     311  
 Pridie v. Field, 143  
 Prieaux, Lee v., 467  
 Priest, Rippen v., 143  
 Priestley v. Holgate, 400  
 Prince Henry the 69th, *In bonis*, 67  
 Prince, Upton v., 597  
 Fring v. Fring, 64  
 Prior, Sproule v., 628  
 Pritchard's Trusts, 512  
 Pritchard v. Arbouin, 397  
   — Bodenham v., 156  
   — Bull v., 409  
   — Hughes v., 152  
   — v. Pritchard, 145  
 Proby, Bastard v., 557  
 Procter v. Bath and Wells, Bishop of,  
   435  
   — v. Upton, 371  
 Proctor, Snowball v., 334  
 Prodgers, Portland, Countess of, v., 18  
 Prothero, Brummel v., 642  
 Pruen, Griffith v., 288  
   — v. Osborne, 260  
 Provisional Government of Paraguay,  
   Lynch v., 3  
 Prowse v. Abingdon, 407, 628  
 Pryce, Hare v., 186  
   — v. Newbolt, 213  
 Pryor v. Pryor, 31  
 Puchey, Denn d. Webb v., 344  
 Puddephatt, *In bonis*, 23, 25  
 Pugh, Goodtitle d. Bailey v., 270  
   — Lang v., 412  
 Pullen, Dalby v., 72  
 Pulling, Berkeley v., 242  
 Pulsford v. Hunter, 414, 415  
 Punchard, *In bonis*, 77  
 Purcell, Manning v., 144, 150  
 Purdon, Longford v., 14, 21  
   — North, Lord, v., 615  
 Purse v. Snaphin, 104  
 Purser v. Darby, 169  
 Purton, Gimblett v., 247  
 Pushman v. Filliter, 380  
 Puxley, Lewis v., 333  
   — v. Puxley, 205  
 Pybus, De Mazay v., 617  
   — v. Mitford, 335  
   — Smith v., 109  
 Pye, Currie v., 117, 304  
   — Maddeson v., 626  
 Pym v. Lockyer (12 Sim. 394), 463  
   — v. Lockyer (5 M. & Cr. 29),  
     595, 596  
 Pyot v. Pyot, 278  
 QUAIN v. Harvey, 631  
 Quealy, Power v., 277  
 Queen Anne's Bounty, Governors of,  
   Jackson v., 306  
 Queen's College v. Sutton, 105, 108  
 Queen's Proctor, Coombs v., 18  
   — Gregory v., 24, 31  
 Quennell, Turner v., 102, 639, 642  
 Quedsted v. Michell, 272



- Quick, Aird *v.*; Aird's Estate, *In re*, 597  
   — *v.* Quick, 47  
 Quihampton *v.* Going, 60, 597  
 Quin *v.* Armstrong, 176  
   — Baylee *v.*, 114  
 Quinlan, Sims *v.*, 293, 299  
 Quinn *v.* Butler, 40, 41, 577  
   — Hodkinson *v.*, 361  
  
 RABBETH *v.* Squire, 156, 573  
 Rachfield *v.* Careless, 615, 616  
 Rackham *v.* De La Mare, 482  
   — *v.* Siddall, 349  
 Rackstraw *v.* Vile, 543  
 Radburn *v.* Jervis, 62, 388  
 Radcliffe *v.* Buckley, 240  
   — Day *v.*, 523  
   — Holloway *v.*, 277, 284  
 Radford *v.* Willis, 217, 527  
 Radnor, Earl of, Campbell *v.*, 116  
   — Lord, Talbot *v.*, 82  
 Rae's Estate, *In re*, 382  
 Raffanel, *In bonis*, 7  
 Raikes *v.* Boulton, 624  
   — Sandford *v.*, 95  
   — *v.* Ward, 379  
 Raine, *In bonis*, 12  
 Rainer, Sprackling *v.*, 251  
 Rainsford, Browne *v.*, 506  
 Ralsbeck, Moor *v.*, 239, 575  
 Ralph *v.* Carrick, 260, 263, 448, 564, 566, 619  
 Ramage, Hopkins *v.*, 72  
 Rammell *v.* Gillow, 520, 522  
 Ramsay, Bridger *v.*, 536  
   — *v.* Shelmerdine, 190, 607, 611  
   — *v.* Thorngate, 387  
 Ramsbottom, Holden *v.*, 150  
 Ranccliffe *v.* Parkyns, 85, 87  
 Randall *v.* Daniell, 557  
   — Head *v.*, 261, 321  
   — Jones *v.*, 395  
   — Lett *v.*, 392, 477, 611  
   — Patton *v.*, 360  
   — *v.* Payne, 456  
   — *v.* Russell, 472  
 Randell *v.* Bookley, 615  
 Randfield *v.* Randfield, 94, 490, 576  
 Ranelagh *v.* Ranelagh, 503, 545, 569  
 Rankin, Fryer *v.*, 147  
 Ranking's Settlement Trusts, 276  
 Ransome *v.* Burgess, 368  
 Rapington *v.* Roberts, 430  
 Rattey, Hill *v.*, 327, 392  
 Ravenhill, Hereford *v.*, 194, 198  
 Ravenscroft *v.* Hunter, 33  
 Ravenscroft *v.* Jones, 595, 596, 597  
 Rawding, Doe *v.*, 529  
   — Doe d. Baldwin *v.*, 527  
 Rawle, Powell *v.*, 451  
 Rawley, Grieves *v.*, 257  
 Rawling, Pidgely *v.*, 645  
 Rawlings *v.* Jennings, 185, 374, 392, 617  
 Rawlins, *In bonis* (2 Curt. 326), 28  
   — *In bonis* (48 L. J. P. 64; 28 W. W. 139), 44  
   — Ford *v.*, 417  
   — *v.* Powell, 592  
   — *v.* Rawlins, 136, 139  
   — Reay *v.*, 240  
 Rawlinson *v.* Rawlinson, 122  
   — *v.* Wass, 271  
 Rawson, Lazonby *v.*, 636  
   — *v.* M'Causland, 142  
 Ray, *Ex parte*, 468  
   — West *v.*, 74  
 Rayner *v.* Mowbray, 264, 282  
 Read *v.* Crop, 85  
   — *v.* Hodgens, 293  
   — Neathway *v.*, 508, 509  
   — *v.* Phillips, 53  
   — *v.* Read, 157  
   — Sansbury *v.*, 417  
   — *v.* Snell, 331, 371  
   — *v.* Stedman, 612, 614  
 Reade, Doe d. Reade *v.*, 169  
 Reay, Cookson *v.*, 194  
   — *v.* Cowcher, 55  
   — Lord, Gordon *v.*, 63  
   — *v.* Rawlins, 240  
 Record, Bielefield *v.*, 524  
 Rede *v.* Oakes, 359  
 Redfern, *In re*; Redfern *v.* Bryning, 583  
   — *v.* Bryning, 583  
   — Scholefield *v.*, 646  
 Reece *v.* Steel, 442  
 Reed *v.* Braithwaite, 261, 530  
   — *v.* Devaynes, 287  
   — Dix *v.*, 288  
   — Watson *v.*, 115  
 Rees, *In bonis*, 23  
   — *In re*; Rees *v.* George, 599  
   — Lewis *v.*, 351  
   — *v.* Rees, 31  
 Reeve's Trusts, *In re*, 288, 626  
 Reeve *v.* A.-G., 299  
 Reeves *v.* Baker, 183, 376  
   — *v.* Creswick, 635  
   — *v.* Glover, 64  
   — *v.* Herne, 455  
 R. *v.* Buccleuch, Duchess of, 154  
   — *v.* Garland, 71  
   — *v.* Portington, 293  
   — *v.* Wilson, 356

- Reid, *In bonis*, 3  
   — v. Atkinson, 380  
   — Herbert r., 216  
   — v. Reid, 73, 251, 484  
 Reilly, Dillon r., 292, 293  
   — Plunket r., 613  
 Reith r. Seymour, 376  
 Remnant v. Hood, 407  
 Renaud v. Tourangeau, 459  
 Rendall, Charlton r., 559  
 Renneck, Woodcock r., 423  
 Rennison, Longstaff r., 307, 308  
 Rennoldson, Morley r., 453  
 Repton, White r., 52  
 Restal, Sparks r., 500, 569  
 Rex r. Stafford, Marquis of, 536  
 Reynard v. Spence, 88  
 Reynish v. Martin, 455  
 Reynold v. Wright, 613  
 Reynolds, *In bonis*, 43, 59, 63  
   — Chapman r., 145  
   — v. Godlee, 199  
   — Lachlan r., 331, 433  
   — Mitford r., 585  
   — v. Torin, 88  
   — Vaisey r., 147, 148, 151  
   — v. Whitan, 207  
   — v. White, 54  
   — Wild v., 605  
 Rhodes r. Muswell Hill Land Co., 453  
   — r. Rhodes, 261  
   — Scott r., 53, 54  
   — Shaw r., 444  
   — v. Whitehead, 244, 404, 474  
   — Willox v., 110  
 Riccardson, Pistol v., 165  
 Rice, *In bonis*, 32  
   — Aislabie r., 451  
   — Weall r., 589  
 Rich v. Cockell, 90  
   — v. Whitfield, 194  
 Richards, *In bonis*, 15  
   — *In re*, 140  
   — v. Bergavenny, Lady, 342  
   — v. Davies, 532  
   — Incorporated Society r., 92, 162, 311, 530  
   — r. Mumford, 46  
   — Potter r., 454  
   — v. Richards, 136, 223  
 Richardson, *Ex parte*, 366  
   — v. Barry, 42  
   — v. Elphinstone, 592, 593  
   — Forbes v., 637, 638  
   — Glass v., 356  
   — v. Greese, 594  
   — v. Morton, 631  
   — v. Nixon, 387  
   — v. Power, 519  
 Richardson v. Richardson, 277  
   — Saunders r., 219  
   — v. Spragg, 492  
   — Sutcliffe r., 450  
   — Taylor v., 208  
   — Vorley v., 509, 518  
   — v. Watson (1 Nev. & M. 575), 95  
   — v. Watson (4 B. & Ad. 787), 101, 212  
 Rickabe r. Garwood, 252  
 Rickard v. Barrett, 627  
   — v. Robson, 291  
 Rickards, Darbon r., 637  
 Rickets v. Ladley, 110  
 Rickett v. Guillemard, 513  
 Ricketts, Bourke r., 138  
   — v. Turquand, 96  
 Rickman r. Morgan, 591  
 Ridding, *In bonis*, 24  
 Ridehalgh, Habbergham r., 241, 493, 494, 497  
 Ridge's Trusts, *In re*, 262  
   — Trusts, *Re*, 572  
 Ridge v. Newton, 101, 147  
 Ridgeway v. Munkittrick, 261  
 Ridgway r. Ridgway, 416  
   — Smith v., 98  
 Ridings, Robley r., 248  
 Ridley, *In re*; Buckton r. Hay, 431  
 Rigden v. Vallier, 9  
   — Vane, Earl, r., 364  
 Riggs, London, Corporation of, r., 156  
 Right v. Creber, 272, 336  
   — v. Day, 324, 542  
   — d. Compton v. Compton, 326  
   — d. Phillips v. Smith, 347  
 Rigley's Trusts, *In re*, 291, 298  
 Riley v. Garnett, 351, 404  
   — Ormerod v., 480  
   — Powell r., 111, 642  
 Ring v. Hardwick, 440  
 Ringrose v. Bramham, 240, 248  
 Ringstead, King r., 564, 565  
 Riordan r. Banon, 64  
 Ripley, *In bonis*, 23  
   — v. Moysey, 626  
 Rippen v. Priest, 148  
 Rippin, *In bonis*, 39  
 Rippon, Curtis r., 381  
   — v. Norton, 463  
 Rishton v. Cobb, 215, 375  
 Rivers' Settlement, *Re*, 224  
 Roadknight, Newbold r., 110  
 Roadley v. Dixon, 88  
 Roake v. Denn, 170  
 Robarts, Mills v., 142  
 Robb v. Dorian, Bp., 296  
 Robbins, Lumley v., 554  
 Robello, Delmare v., 207

- Roberts, *In re*; Rapington v. Roberts, 430  
 — Adams v., 221  
 — Blewitt v., 391  
 — v. Dixwell, 466  
 — v. Edwards, 274  
 — Greenwood v., 437  
 — Hauby v., 628  
 — v. Kuffin, 102, 186  
 — Lloyd v., 27  
 — Parry v., 458  
 — v. Phillips, 29  
 — Piercy v., 462  
 — v. Pocock, 106  
 — Rapington v., 430  
 — v. Roberts, 11  
 — v. Smith, 88  
 — v. Spicer, 467  
 — Vachell v., 200  
 — v. Walker, 93, 640  
 — Williams v., 383, 529  
 — v. Youle, 526  
 Robertson's Trust, 386  
 Robertson v. Armstrong, 364  
 — v. Fraser, 320  
 — Hall v., 218  
 — v. Powell, 579  
 — Savage v., 228  
 — v. Smith, 11  
 — v. Walker, 358  
 — Young v., 407, 515, 516, 519  
 Robins, A.-G. v., 622  
 — Collis v., 639, 642  
 — Dolphin v., 4, 5  
 — Powell v., 632  
 — v. Rose, 465  
 — Spinks v., 596  
 — Utterton v., 62  
 Robinson, *In bonis* (1 P. & D. 384; 2 P. & D. 171), 9, 11, 55  
 — *In re*, 364  
 — v. Addison, 105, 106  
 — Bentley v., 633  
 — Brandon v., 461  
 — Burgess v., 451  
 — Buttery v., 387  
 — v. Chamberlayne, 54  
 — v. Cleaton, 386  
 — Dickson v., 83  
 — Doe d. Jeff v., 335  
 — v. Dugate, 375  
 — Eustace v., 559  
 — v. Evans, 285  
 — v. Geldard, 629  
 — v. Gray, 327  
 — v. Hunt, 393, 539  
 — Jones v., 157  
 — Knight v., 148  
 — Leake v., 409, 436  
 Robinson v. London Hospital, Governors of, 194, 311  
 — v. Lowater, 362  
 — Mason v., 637  
 — Milliner v., 332  
 — v. Robinson, 333, 336  
 — Shearman v., 366  
 — v. Shepherd, 256  
 — v. Smith, 285  
 — v. Sykes, 254  
 — Thompson v., 257  
 — v. Tickell, 386  
 — v. Waddelow, 267  
 — v. Wheelwright, 400  
 — v. Wood, 478  
 Robley v. Ridings, 248  
 — v. Robley, 117  
 Robson, Naylor v., 509  
 — Rickard v., 291  
 Roch v. Cullen, 115, 117  
 — Tombs v., 627  
 — Tunaley v., 568  
 Roche v. Harding, 621  
 Rochfort v. Fitzmaurice, 557  
 — Sperling v., 181  
 Rochford v. Hackman, 461, 463  
 Rockcliffe, Welby v., 110, 639, 640  
 Rocke v. Rocke, 461  
 Roddy v. Fitzgerald, 336, 338, 341, 343, 570  
 Roden v. Smith, 139  
 — Underhill v., 315, 332  
 Rodger, Pickersgill v., 81  
 Rodhouse v. Mold, 132  
 Rodon, Israel v., 35, 57  
 Roe d. Fox, Marston v., 57  
 — d. James v. Avis, 163  
 — Marston v., 57  
 — d. Ryall v. Bell, 97  
 — v. Scott, 546  
 — d. Sheers v. Jeffery, 546  
 — v. Summerset, 566  
 — d. Thong v. Bedford, 336  
 — d. Walker v. Walker, 155  
 Roffey v. Bent, 464  
 — v. Early, 111  
 Rogers, *Ex parte*, 569  
 — Albemarle, Earl of, v., 155  
 — Baldwin v., 436  
 — Gaskin v., 94, 153, 628  
 — v. Goodenough, 43, 60  
 — Griffith v., 616  
 — v. Jones, 81  
 — Martineau v., 411, 490  
 — v. Maule, 612  
 — v. Mutch, 248  
 — v. Rogers, 383, 495  
 — Rose v., 596  
 — v. Thomas, 145  
 — v. Towrie, 510

- Rolfe, Emperor v., 521  
   — v. Ferry, 129  
 Rolland, Paterson v., 320  
 Romaine v. Onalow, 589  
 Romans v. Mitchell, 289  
 Romney, Lord, Foster v., 406  
 Rood, Cusack v., 280  
 Rook v. A.-G., 252  
 Rooke v. Rooke (2 Vern. 461; 1 Eq. Ab. 210, pl. 17), 161  
   — v. Rooke (2 Dr. & S. 38), 175  
 Roose v. Chalk, 614, 617  
 Rootes, *Re*, 273  
 Rooth, Askew v., 148  
 Roper's Trust, *In re*, 367  
 Roper Curzon v. Roper Curzon, 369  
   — v. Roper, 333, 334, 621  
 Yorke, Archer v., 467  
 Rose, *In bonis*, 45  
   — v. Bartlett, 165  
   — v. Cunyngname, 55  
   — Robins v., 465  
   — v. Rogers, 596  
   — Simmons v., 640  
   — d. Vere v. Hill, 323, 510  
 Roseingrave v. Burke, 135  
 Ross's Trust, *Re*, 471  
 Ross v. Borer, 391, 392  
   — Cunningham v., 121  
   — Hicks v., 391, 392  
   — v. Ross, 264, 260, 554  
 Rossborough, Boyse v., 21  
 Rosser, Evans v., 454  
 Rossiter, *In re*; Rossiter v. Rossiter, 132  
 Rothwell, Greenwood v., 345  
   — Howarth v., 636  
 Round, Harrison v., 549  
 Rous, Cambridge v. (8 Ves. 14), 183, 484  
   — Cambridge v. (25 B. 416), 376, 479, 512, 516  
   — Lord, Tower v., 642  
 Rouse's Estate, 413  
 Rouse, Doe d. Gains v., 210  
 Routh, Johnson v., 199, 647  
 Routledge v. Dorril, 443  
   — Trollope v., 626  
 Row's Estate, *In re*, 504  
 Row, Collingwood v., 204  
   — v. Row, 624  
   — Wells v., 641  
 Rowbotham v. Dunnett, 65  
 Rowe, A.-G. v., 6  
   — Bright v., 513, 516  
   — Dixon v., 464  
   — v. Rowe, 203, 593  
 Rowen, Massy v., 468, 469  
 Rowland v. Gorsuch, 262  
   — v. Morgan, 552  
 Rowland v. Tawney, 408  
   — Ware v., 281  
   — Wigan v., 94  
 Rowles v. Mayhew, 627  
 Rowlett, Osborne v., 75  
 Rowley, Appleton v., 370, 466  
   — Barnes v., 388  
   — Harrison v., 287  
 Rownd v. Peckett, 395  
 Roxburgh v. Fuller, 116  
 Royal, Doe d. Patrick v., 255  
 Rucastle, Doe v., 344  
   — Doe d. Cannon v., 327  
 Rucker, Furneaux v., 137  
 Rudall, Simmons v., 33, 190  
   — Warren v. (4 K. & J. 603), 481  
 Rudell, Warren v. (1 J. & H. 1), 82  
 Rudge v. Barker, 513  
   — v. Winnall, 151, 414  
 Ruding's Settlement, *In re*, 179  
 Rudstone v. Anderson, 123  
 Rufford, Clay v., 358  
 Rugg, Weakley d. Knight v., 533  
 Rule, *In bonis*, 67  
 Rumney, Sawrey v., 115  
 Rumsey, Gibbs v., 197, 289  
 Russell v. Aubyn, 589  
   — v. Buchanan, 402, 403  
   — v. Dickson, 115  
   — v. Jackson, 65, 313  
   — v. Kellett, 296, 297  
   — London, Lord Mayor of, v., 117  
   — Randall v., 472  
   — v. Russell, 219  
   — Strode v., 167, 219  
   — Williams v., 409, 420  
 Rust v. Baker, 495  
 Rutherford v. Maule, 53  
 Rutter, Pearson v., 478  
 Ryall v. Hannam, 209  
   — v. Kennedy, 4  
 Ryan v. Cowley, 341  
   — Jones v., 543  
   — v. Keogh, 385, 396  
 Rycroft v. Christy, 467  
 Ryde, *In bonis*, 68  
 Ryder, *In bonis*, 76  
   — Faversham, Mayor of, v., 307  
 Rye's Settlement, 542, 544  
 Rye v. Rye, 419, 421  
 Rymer v. Clarkson, 53  
 Ryres v. Ryres, 320, 620  
 SABERTON v. Skeels, 370  
 Sabin v. Heape, 361  
 Sackville v. Smith, 182  
 Sackville-West v. Holmesdale, Viscount, 558, 560

- Sadler, Sutton v., 14, 20  
   — v. Turner, 617  
   — Webb v., 370, 377  
 Sadlier v. Butler, 86  
 Saffery, Parsons v., 238, 289  
 St. Albans, Duke of, v. Beauchlerk, 116  
 St. Catherine's College, Farrar v., 213, 620  
 St. George's Hospital, Governors of, Philpott v., 310  
 St. John, Whitbread v., 251  
 St. Leonards, Lord, Sugden v., 46, 47  
 St. Sauveur, Sharp v., 18, 93  
 St. Vincent, Lord, Beech v., 446  
 Sale, Crompton v., 596  
   — v. Moore, 379  
 Salisbury, Marquis of, Beaumont v., 351  
   — Edge v., 263, 295  
   — v. Lamb, 511, 523  
   — v. Petty, 493  
 Salkeld v. Vernon, 539  
 Sallery, *Re*, 535  
 Sallitt, Hicks v., 154  
 Salmon v. Salmon, 438  
 Salomons, Stokes v., 158  
 Saloway, Edwards v., 603  
 Salt, Andrews v., 80  
   — Carter v., 637  
   — v. Chattaway, 196, 640  
   — Evans v., 273  
 Salter, Barlow v., 546  
   — Jones v., 470  
 Saltmarsh v. Barrett, 289, 613  
 Salusbury v. Denton, 263, 298, 303  
 Salvin v. Weston, 638  
 Sambourne v. Barry, 555  
 Samford, Boocher v., 155  
 Samson, Heath v., 6  
 Samuel v. Samuel (12 Ch. D. 152), 465  
   — v. Samuel (9 Jur. 222), 373, 557  
   — v. Ward, 586  
 Sanicroft, Stollworthy v., 421  
 Sandeman v. Mackenzie, 222  
 Sanders' Trusts (3 K. & J. 152), 279  
   — Trust, *In re* (L. R. 1 Eq. 675), 222, 528, 529, 540  
 Sauders v. Ashford, 538, 607  
   — v. Franks, 370  
   — v. Kiddell, 143  
 Sanderson's Trust, 386  
 Sanderson v. Bayley, 258  
   — v. Dobson, 157  
   — Stewart v., 624  
 Sandford v. Raikes, 95  
   — v. Vaughan, 55  
 Sandom, Billings v., 485  
   — Scriven v., 180  
 Sands, A.-G. v., 612  
 Sandwich, Earl of, Montagu v., 146  
 Sandys, Campbell v., 72  
   — Wilday v., 193  
 Sanford v. Irby, 157, 542  
   — Langham v., 616  
 Sanbury v. Read, 417  
 Sarel, *Re*, 470  
 Sargent, Phillips v., 648  
   — Turner v., 561  
 Sargon, Stubbs v., 64, 383  
 Saril v. Saril, 255  
 Sarjeant, *Re*, 488  
 Saunarez v. Saunarez, 158  
 Saunders, *In bonis* (51 L. J. P. 53), 29  
   — (1 P. & D. 16), 52  
 Saunders' Trusts, *In re*, 479, 527  
 Saunders, Bustard v., 316  
   — Earlom v., 194  
   — v. Eppe, 350  
   — v. Richardson, 219  
   — v. Vautier, 412, 461  
 Savage, *In bonis*, 43  
 Savage's Trusts, *In re*, 191  
 Savage, Ayscough v. (13 W. R. 373), 253  
   — Jeyes v., 418, 419, 493, 533  
   — Mahon v., 295  
   — v. Robertson, 228  
   — v. Tyers, 378  
 Sawrey v. Rumney, 115  
 Saxton v. Saxton, 123  
 Say v. Creed, 275  
   — Lord, Jones v., 347  
 Sayer's Trusts, *In re*, 430  
 Sayer, Hughes v., 545  
   — Milward, Holmes v., 165  
   — v. Sayer, 175  
   — Wills v., 467  
 Scales, Masters v., 498  
 Scammell v. Wilkinson, 15  
 Scarancke, Cotton v., 257  
 Scarborough, Earl of, Doe d. Lumley v., 550, 551  
   — v. Borman, 470  
   — Earl of, Scott v., 137, 251  
 Scarfe, Casborne v., 167  
 Scarsbrick v. Skelmersdale, Lord (4 Y. & C. Ex. 78; 2 H. L. 167), 220  
   — v. Skelmersdale, Lord (17 Sim. 187), 443  
 Scarlett v. Abinger, Lord, 458  
 Scarsdale, Lord, v. Curzon, 552, 553  
 Scarth, *In re*, 154  
 Scawin v. Watson, 378  
 Schenck v. Agnew, 484  
 Schloss v. Stiebel, 214  
 Schneider, Wilkinson v., 180

Schofield v. Heap, 595  
 Schofield v. Redfern, 646  
 Schroder v. Schroder, 89  
 Scott v. Alberly, 159  
   — Banks r., 206  
   — v. Bargeman, 573  
   — r. Best, 134  
   — Cole r., 162  
   — v. Cumberland, 620, 624, 626  
   — Dawes r., 638  
   — Dimes r., 646  
   — Doe d. Wells r., 161  
   — Evans r., 407  
   — v. Forristall, 619  
   — r. Harwood, 244  
   — r. Izon, 366  
   — t. Jones, 629  
   — v. Josselyn, 376  
   — r. Key, 385  
   — Mather r., 309  
   — r. Moore, 189  
   — Packer r., 436  
   — Paterson r., 627  
   — v. Rhodes, 53, 54  
   — Roe r., 546  
   — v. Scarborough, Earl of, 137, 251  
   — r. Scott (1 Sw. & T. 258), 36  
   — r. Scott (11 Ir. Ch. 114), 316  
   — Tugwell r., 233  
 Scoular v. Plowright, 20  
 Scowcroft, Bowen r., 435  
 Scrafton, Kenebel r., 56, 57, 226  
 Scripps, Clarke r., 46  
 Scriven, Playne r., 24  
   — v. Sandom, 180  
 Seadamore, Doe d. Planner r., 403  
 Sculthorpe v. Tipper, 365  
 Seale v. Barter, 334  
   — r. Seale, 371, 557, 584  
 Sealey r. Stawell, 558  
 Seaman v. Wood, 438  
 Seaward v. Willock, 442  
 Seawell, Bond r., 24  
 Sebright, Baker r., 646  
 Secombe v. Edwards, 529  
 Seifferth v. Badham, 232  
 Selby, Ellis r., 183  
   — Hind r., 203  
   — Knight r., 328  
   — v. Whitaker, 408  
 Seley v. Wood, 615  
 Selsey, Lord, v. Lake, Lord, 242  
 Selwood r. Mildmay, 102  
 Serres' Estate, *Re*; Venes v. Marriott, 216  
 Seuter, Vick r., 326  
 Seward, Field v., 599  
   — Mills r., 339  
 Sewell's Estate, *In re*, 200

Sewell, Clarke r., 139  
   — Cole r., 424, 425, 426, 428, 431  
   — v. Crewe-Read, 309  
   — Lane r., 151  
   — Legatt r., 338  
   — Mackinnon r., 483  
 Seymour's Case, 429, 474  
 Seymour's Case (Com. Rep. 453; 1 P. W. 346; 2 Vern. 742), 46  
   — Case (3 Curt. 530), 52  
   — Trusts, *Re*, 236  
 Seymour, Clark r., 358  
   — Coleman r., 221, 250  
   — r. Kilbee, 569  
   — r. Lucas, 465  
   — Polley r., 193  
   — Reith r., 376  
   — r. Vernon, 461  
   — Wallace r., 576  
 Shadbolt v. Thornton, 303  
 Shaftsbury v. Shaftsbury, 119, 122  
 Shaftsbury, Earl of, v. Marlborough, Duke of, 118  
   — Earl of, Webb r., 83  
 Shaller v. Groves, 253  
 Shakespeare, Thompson r., 92, 291, 430  
 Shallcross v. Finden, 632  
   — r. Wright, 197  
 Shand v. Kidd, 492  
 Shanley v. Baker, 554  
 Shannon, James r., 565, 567  
 Sharman, *In bonis*, 30, 94  
 Sharp, Briggs r., 154, 385  
   — r. Cosserat, 466  
   — Guy r., 115  
   — r. St. Sauveur, 18, 93  
   — Sutton r., 186  
 Sharpe v. Crispin, 4, 6  
   — v. Sharpe, 169  
 Shaw, *In bonis*, 46  
   — *Ex parte*, 169  
 Shaw's Trusts, *In re*, 365  
 Shaw, Blake r., 151  
   — v. Borrer, 361, 631  
   — v. Ford, 376, 460  
   — r. Lawless, 380  
   — r. MacMahon, 606, 608  
   — v. Neville, 28  
   — v. Rhodes, 444  
 Sheard, Sykes r., 358  
   — Tolson v., 366  
 Shearman v. Robinson, 366  
 Shearn, *In bonis*, 34  
 Sheath v. York, 57  
 Sheddon, Du Hourmelin r., 93  
   — v. Godrich, 55, 90  
 Shedden, Hawthorn r., 178, 624  
 Sheffield v. Coventry, Earl of, 473  
   — v. Kennett, 533

- Sheffield, *Mass v.*, 17  
   — *v. Orrery*, Lord, 399  
   — *v. Von Donop*, 102  
 Sheldon *v. Dormer*, 634  
   — *Gardner v.*, 564, 565  
   — *r. Sheldon*, 9, 68  
 Shelford *r. Aakland*, 172, 178  
 Shelley's Case, 335, 336, 339, 342, 337  
 Shelley *r. Bryer*, 257  
   — *Gill v.*, 228  
   — *r. Shelley*, 383, 553, 559  
   — *Sidney v.*, 609  
 Shelmerdine, *Ramsay v.*, 190, 607, 611  
 Shelton *r. Watson*, 557  
   — *Wright v.*, 160  
 Shenton, *Denn d. Gearing v.*, 329  
 Shephard, *Newland v.*, 568  
 Shephard, *In bonis*, 184  
   — *r. Beatham*, 629  
   — *r. Beatham*, 303  
 Shepherd, *Challenger v.*, 323  
   — *Elton v.*, 374  
   — *Halfhead v.*, 570  
   — *r. Ingram*, 137, 244  
   — *Knollys v.*, 167  
   — *r. Nottidge*, 381  
   — *Robinson v.*, 256  
 Shepherdson *v. Dale*, 321  
 Sheppard *v. Sheppard*, 637  
 Sherer *r. Bishop*, 241  
 Shergold *v. Bone*, 494  
   — *r. Shergold*, 10  
 Sherratt *r. Bentley*, 578, 579  
   — *Birch v.*, 637  
   — *Leeming v.*, 417, 508, 511, 517, 539  
   — *r. Mountfield*, 257  
   — *r. Oakley*, 574  
 Sherson, *Bothamley v.*, 106, 125  
 Sherwin *r. Keny*, 328  
 Shewell *r. Dwarries*, 467  
 Shillingford, *Penfold v.*, 648  
 Shingler *r. Pemberton*, 11  
 Shipphard, *Doe d. Watson v.*, 477  
 Shires *v. Glascock*, 29  
 Shirley's Trusts, *Re*, 555  
 Shirt *v. Westby*, 137  
 Shore, *Humble v.*, 191  
   — *Patch v.*, 179  
   — *Walker v.*, 246  
   — *r. Wilson*, 95  
 Short, *Long v.*, 110, 624  
   — *r. Smith*, 38  
 Shotter, *Doe v.*, 355  
 Shovelton *r. Shovelton*, 384  
 Showler, *Burgoyne v.*, 23  
 Shrewsbury *v. Hornby*, 292  
   — *Talbot v.*, 592  
   — *Earl of, Talbot v.*, 79  
 Shrimpton, *James v.*, 37  
   — *v. Shrimpton*, 402, 410  
 Shuldham *v. Smith*, 404  
 Shum *v. Hobbs*, 410  
 Shuttleworth, *West v.*, 292, 293  
 Sibbon, *Calvert v.*, 287  
 Sibley's Trusts, *In re*, 256, 262, 496, 500, 501  
 Sibley *v. Cook*, 603  
   — *v. Perry*, 105, 153, 260  
 Sibthorp, *In bonis*, 68  
   — *r. Moxom*, 602  
 Siddall, *Rackham v.*, 349  
 Sidebotham *v. Watson*, 109, 346  
 Sidgreaves *r. Brewer*, 64, 94, 183, 293  
 Sidgwick, *Kennedy v.*, 532  
 Sidney *v. Shelley*, 609  
   — *r. Sidney*, 109, 121  
 Siggers, *Gray v.*, 201  
 Sikes *r. Snaith*, 54  
 Silcox *v. Bell*, 259  
 Sillick *v. Booth*, 513, 517, 520  
 Silverside *v. Silverside*, 598  
 Silvester *v. Jarman*, 148  
 Simcock, *Johnson v.*, 530  
 Simmerson, *Meyer v.*, 210  
 Simmonds *v. Cocks*, 402, 403  
   — *Palmer v.*, 379  
 Simmons *v. Norton*, 645  
   — *v. Pitt*, 609  
   — *r. Rose*, 640  
   — *v. Rudall*, 33, 190  
   — *r. Simmons*, 563  
   — *v. Vallance*, 104  
 Simms, *Hannam v.*, 494  
   — *Pinchin v.*, 593, 594  
 Simon *v. Barber*, 297  
 Simonsen, *Meyer v.*, 647  
 Simpson, *In bonis*, 45  
   — *Accey v.*, 621  
   — *r. Ashworth*, 323  
   — *Avison v.*, 183, 275  
   — *Doe v.*, 352  
   — *Doe d. Blesard v.*, 329, 532  
   — *Doe d. Simpson v.*, 532  
   — *Doe d. White v.*, 352  
   — *Freeman v.*, 138  
   — *Greaves v.*, 342  
   — *r. Hornsby*, 565  
   — *Hutton v.*, 564  
   — *r. Lister*, 200, 211  
   — *r. Peach*, 409  
   — *Pearsall v.*, 405  
   — *Tilley v.*, 157, 158  
   — *r. Vickers*, 45, 98  
   — *Walker v.*, 416, 419  
 Simson, *Longdon v.*, 445  
 Sims *v. Quinlan*, 293, 299  
 Sindrey, *Holt v.*, 227, 220, 224  
 Sing *v. Leslie*, 181, 224

- Singleton v. Gilbert, 243  
   — v. Tomlinson, 60, 63, 153, 195  
 Sinnott v. Herbert, 297, 308, 312  
 Sinnott v. Walsh, 73, 251, 267  
 Sison, Mackinley v., 102, 176  
 Sitwell v. Bernard, 526, 647  
 Skeats, Belbin v., 23  
 Skeels, Saberton v., 370  
 Skelmersdale, Ltd., Scarisbrick v. (4  
   Y. & C. Ex. 78; 2 H. L.  
   167), 220  
   — Scarisbrick v. (17 Sim. 187),  
   443  
 Skey v. Barnes, 573  
 Skinner's Trust, *Re*, 386  
 Skinner, Jones v., 162  
 Skipper v. King, 419  
 Skipworth, Green v., 54  
 Skirrow, Bristow v., 180  
 Skirving, Hepburn v., 162  
   — v. Williams, 203  
 Skrymster v. Northcote, 190, 626  
 Sladden, Pratt v., 614, 616  
 Slade v. Fooks, 258  
   — v. Milner, 484  
 Sladen v. Sladen, 269  
 Slaney v. Slaney, 488  
   — v. Watney, 287  
 Slark v. Dakyna, 440  
 Slater v. Dangerfield, 331, 345  
   — Denn v., 324  
   — Gardiner v., 455  
   — Milnes v., 614, 617, 639  
   — Oldman v., 615  
 Slatter v. Noton, 122  
 Slee, Croft v., 171  
 Slesch v. Thorington, 105, 216  
 Sleeman v. Wilson, 79  
 Slingsby v. Grainger, 99, 100, 147  
 Sloper, Alcock v., 203  
 Smaling, *In re*; Johnson v. Smaling,  
   486  
   — Johnson v., 486  
 Small, Dawson v., 299, 535, 585  
   — v. Wing, 635  
 Smallman v. Goolden, 109  
 Smallwood, Walker v., 360  
 Smart v. Clark, 484  
 Smee v. Smee, 14  
 Smith's Case, 62  
 Smith, *In bonis* (1 P. & D. 717), 12  
   — *In bonis* (16 W. R. 1130), 67  
 Smith's Estate, *In re*, 169  
   — Trusts, *In re*, 607  
 Smith, *Re*, 246, 574, 577  
 Smith's Will, 417  
 Smith v. Adkins, 74  
   — v. Barneby, 283  
   — Bon v., 278  
   — Brookman v., 270, 272, 475, 483  
 Smith, Brown v. (15 B. 444), 5  
   — Brown v. (10 Ch. D. 377), 368  
   — v. Butcher, 273  
   — v. Butler (3 J. & L. 565), 144  
   — v. Butler (1 J. & L. 692), 147  
   — v. Campbell, 263  
   — Chambers v., 463  
   — v. Charles, 527  
   — v. Claxton, 198  
   — v. Colman, 487  
   — v. Conder, 63, 597, 598  
   — v. Coney, 214  
   — v. Cowdery, 455  
   — v. Crabtree, 582, 598  
   — v. Cunningham, 44  
   — v. Davis, 185  
   — Davy v., 29  
   — Doe d. Chandler v., 338  
   — Doe d. Chattaway v., 266  
   — Douglas v., 54  
   — Dowding v., 252  
   — Dungannon, Ltd., v., 430, 438  
   — Ellis v., 24  
   — Einuss v., 123, 166, 204  
   — v. Evans, 24  
   — v. Farr, 494  
   — Farrow v., 463  
   — v. Fitzgerald, 109, 574  
   — Forrester v., 509, 510  
   — Foster v., 637, 638  
   — Goodacre v., 21  
   — v. Greenhill, 554  
   — Gregory v., 268  
   — v. Harris, 24  
   — v. Horsfall, 260  
   — v. Havers, 396  
   — Hutchinson v., 151  
   — James v., 230, 258  
   — v. Kerran, 77  
   — v. King, 388  
   — v. Liddiard, 257  
   — Lister v., 11  
   — Low v., 273  
   — Martin v., 630  
   — v. Moreton, 132  
   — Mullins v., 106, 153, 185  
   — v. Oliver, 310  
   — v. Osborne, 504  
   — v. Palmer, 283, 285  
   — v. Pepper, 263, 495  
   — Potts v., 621  
   — v. Pybus, 109  
   — Roberts v., 88  
   — Robertson v., 11  
   — Robinson v., 285  
   — Roden v., 139  
   — v. Ridgway, 98  
   — Right d. Phillips v., 347  
   — Sackville v., 132  
   — Short v., 38



- Smith, Shuldarn *r.*, 404  
   — *v.* Smith (1 P. & D. 143), 27  
   — *r.* Smith (11 C. B. N. S. 121), 328, 352  
   — *r.* Smith (1 L. R. Ir. 206), 317  
   — *r.* Smith (5 Ch. 342), 438, 495  
   — *r.* Smith (8 Sim. 353), 494  
   — *r.* Smith (3 Giff. 121), 594  
   — *r.* Sopwith, 304  
   — *r.* Spencer, 490  
   — *Spire v.*, 115  
   — *r.* Stewart, 486  
   — *r.* Streatfield, 255  
   — *r.* Tebbitt, 14  
   — *r.* Vaughan, 422  
   — *Wagstaff v.*, 471  
   — *Walker v.*, 21  
   — *Wathen v.*, 594  
   — *r.* Wilson, 95  
   — *Wrey v.*, 201  
   — *d.* Dormer *v.* Parkhurst, 399  
 Smithers *v.* Willock, 479  
 Smithson, Ackroyd *r.*, 197  
   — *Hodgson v.*, 479  
 Smiton, Fletcher *r.*, 159  
 Smyth, *Ex parte*, 224  
   — *v.* Power, 538  
   — *r.* Smyth, 159  
 Snaith, Sikes *r.*, 54  
 Snaplin, Purse *r.*, 104  
 Snare, Hewett *v.*, 618  
 Snee, Blackmore *r.*, 510  
 Snelham, Bayley *r.*, 229, 231  
 Snell, Read *r.*, 331, 371  
 Snow *r.* Poulden, 402  
   — *v.* Teed, 267, 275  
 Snowball *v.* Proctor, 334  
 Snowdon *r.* Dales, 462  
 Soames *v.* Martin, 396  
 Soane, Conduitt *r.*, 246  
 Soar *v.* Dolman, 39  
 Society for P. G. *v.* A.-G., 301  
 Solley *r.* Wood, 635  
 Sollory *v.* Leaver, 387  
 Solly *v.* Solly, 491  
 Solomon *v.* Solomon, 120  
 Solomon, Levy *v.*, 227  
 Somers, *Ld.*, Pole *r.*, 83  
 Somerville *r.* Lethbridge, 442  
   — *Londesborough, Ld., v.*, 634  
   — *r.* Somerville, *Ld.*, 5  
 Soper, Page *r.*, 370  
 Sopwith *r.* Maughan, 83  
   — *Smith v.*, 304  
 Sorresby *v.* Hollins, 307  
 Sotheran, Doe *v.*, 320  
 Soule *v.* Gerard, 531  
 South, Wilkinson *v.*, 543  
   — *v.* Williams, 602  
 Southall, Jones *r.*, 120, 179  
 Southam *v.* Blake, 254  
 Southampton, *Ld.*, *r.* Hertford, Marquis of, 432, 433  
 Southcot *r.* Watson, 615  
 Southern, Goodtitle *d.* Radford *r.*, 99  
 Southey, Westwood *r.*, 413, 539, 545  
 Southgate *r.* Clinch, 273  
 Southmolton *v.* A.-G., 300  
 Southouse *v.* Bate, 375, 376  
 Soutten, Ingram *r.*, 436, 511  
 Sowerby's Trusts, *In re*, 602  
 Sowerby *v.* Fryer, 645  
   — *Parker v.*, 38, 417  
 Spalding *v.* Spalding, 583  
 Sparhawk, Alcock *r.*, 633  
 Sparkes *v.* Cator, 588  
 Sparks, Jackson *r.*, 507  
   — *r.* Restal, 500, 569  
 Sparling *v.* Parker, 335, 372  
 Sparrow, Dow *d.* Lifford *v.*, 488, 511  
   — *v.* Josselyn, 108, 109  
 Speakman, *In re*; Unsworth *v.* Speakman, 493, 604, 606  
   — *r.* Speakman, 274  
 Spear, Bone *v.*, 11, 54, 55  
 Speight, Fordham *v.*, 384  
 Spence, Reynard *v.*, 88  
   — *v.* Spence (12 C. B. N. S. 199), 335  
   — *r.* Spence (10 W. R. 605), 352  
 Spencer, Bagshaw *v.*, 349, 476  
   — *Beales v.*, 467  
   — *v.* Bullock, 422  
   — *Farrant v.*, 150  
   — *Pearson v.*, 156  
   — *Pickwell v.*, 326  
   — *Smith v.*, 490  
   — *v.* Spencer (21 B. 548), 122  
   — *v.* Spencer (8 Sim. 87), 224  
   — *r.* Ward, 242  
   — *v.* Wilson, 196, 413  
 Sperling, *In bonis*, 30  
   — *v.* Rochfort, 181  
 Spicer, Middleton *v.*, 614  
   — *Roberts v.*, 467  
   — *Vincent v.*, 645  
 Spink *v.* Lewis, 280  
 Spinks *v.* Robins, 596  
 Spire *v.* Smith, 115  
 Spong *v.* Spong, 631  
 Spooner's Trust, 178, 188  
 Spooner, Hanbury *v.*, 287  
   — *Manning v.*, 618, 620  
   — *Wateley v.*, 597  
 Spotten, *In re*, 63  
 Spragg, Richardson *r.*, 492  
 Sprackling *v.* Rainer, 251  
 Spratley, Watson *v.*, 305  
 Sprigge *v.* Sprigge, 36  
 Springett *v.* Jennings, 188

- Springett, White *r.*, 278, 283  
 Sproule *v.* Prior, 628  
 Spurling, Cleaver *r.*, 455  
 Spurrell *v.* Spurrell, 508  
 Spurway *v.* Glyn, 110, 137  
 Squire, Beaumont *r.*, 456  
   — Collier *v.*, 184  
   — Finch *v.*, 304  
   — Rabbeth *v.*, 156, 573  
   — Wilson *r.*, 297  
 Stables, Blackburn *r.*, 342, 557  
 Stacey, Harvey *r.*, 246  
 Stackhouse, Timins *r.*, 256, 500  
 Stackpoole *v.* Beaumont, 454, 455  
 Stacpoole *v.* Stacpoole, 549  
 Stafford, Earl of, *r.* Buckley, 388  
   — Marquess of, Rex *r.*, 536  
 Stahlschmidt *v.* Lett, 621  
 Stains, Halford *r.*, 446, 448  
 Stainton, Maclaren *r.* (3 D. F. & J. 202), 134, 644  
   — Maclaren *r.* (27 L. J. Ch. 442; 4 Jur. N. S. 199), 156  
   — Maclaren *v.* (4 Eq. 448, 11 Eq. 382), 648  
   — Taylor *v.*, 467, 484  
 Stallibrass, Waut *r.*, 355  
 Stamford, Lord, Pickering *r.*, 603, 611  
 Stammers *v.* Elliott, 123, 124  
   — *v.* Halliley, 622  
 Stamper *v.* Pickering, 636, 637  
 Standen *r.* Standen, 170, 171, 210  
 Standley, *In bonis*, 26  
 Standley's Estate, *Re*, 226  
 Standley, Feakes *r.*, 542  
 Stanhope's Trusts, *Re*, 373, 607  
 Stanhope, Collingwood *r.*, 223  
   — Lane *v.*, 165  
   — *r.* Thacker, 635  
   — Thynne, Lord, *r.*, 37  
 Stanley *v.* Bernes, 3, 7  
   — Boardman *r.*, 77  
   — *r.* Coulthurst, 561  
   — Hervey Bathurst *r.*, 221, 223  
   — *r.* Jackman, 321, 559, 560, 561  
   — Lemayne *r.*, 24  
   — *r.* Lennard, 538  
   — *r.* Stanley, 550  
   — Webber *r.*, 97  
 Stannard, Bolton *r.*, 363  
 Stansfield, *In re*, 607  
 Stanton, Foot *r.*, 23  
   — Humberstone *r.*, 482  
 Stapleton *v.* Stapleton, 581  
 Stares *v.* Penton, 599  
 Starkey *v.* Brooks, 383  
 Starr *v.* Newberry, 281  
 Stationer's Company, Cooke *v.*, 608  
 Stavers *r.* Barnard, 239  
 Stawell, Sealey *r.*, 558  
 Stead *r.* Hardaker, 619, 620  
   — *r.* Mellor, 379  
   — *r.* Platt, 409, 503  
 Stebbing *r.* Walkey, 242  
 Stedman, Read *r.*, 612, 614  
 Steed *r.* Preece, 206  
 Steedman *r.* Poole, 470  
 Steel, Reece *r.*, 442  
 Steele, *In bonis*, 58  
   — *r.* Midland Railway Company, 155  
 Steer, *In re*, 7  
 Steere, Watts *r.*, 644  
 Steeven's Trusts, *In re*, 274, 275  
 Steibel, Constable *r.*, 53  
 Steignes *v.* Steignes, 184, 185  
 Stelfox *r.* Sugden, 637, 638  
 Stenlake, Doe d. Elton *r.*, 337, 442  
 Stephen *r.* Gadsden, 377  
   — Pearson *r.*, 253, 373, 498  
   — *r.* Stephen, 404  
 Stephens, Finden *r.*, 380  
   — Hutchinson *r.*, 327  
   — *r.* Stephens, 86  
   — *r.* Taprell, 45  
   — Wright *v.*, 485  
 Stephenson *r.* Dowson, 108, 147  
   — Nettleton *r.*, 448  
 Stert *r.* Platel, 264  
 Stevens' Will, *Re*, 168  
 Stevens, Badrick *r.*, 106  
   — Bray *r.*, 693  
   — Coates *r.*, 72, 86  
   — Cogan *r.*, 198  
   — Davie *r.*, 333  
   — Gardiner *r.*, 567  
   — *r.* Hale, 565, 566  
   — *r.* Pile, 222, 421  
   — Pitman *r.*, 152, 159  
 Stevenson *r.* Abingdon, 258, 260, 452  
   — *r.* Gullan, 255, 508, 509  
   — *r.* Liverpool, Mayor of, 349, 473  
   — *r.* Masson, 7, 595, 596  
 Stewart, *In bonis*, 61  
   — *r.* Denton, 108, 124  
   — *r.* Green, 291  
   — *r.* Jones, 493, 604, 605  
   — *r.* Sanderson, 624  
   — Smith *r.*, 436  
   — *r.* Stewart (2 Moo. P. C. 193), 53  
   — *r.* Stewart (15 Ch. D. 539), 599  
 Stidolph, Dickinson *r.*, 41, 47  
 Stiebel, Schloss *r.*, 214  
 Still *v.* Hoste, 210

- Stillman v. Weedon, 179  
 Stirling, Peter v., 626  
 Stobie, Hastilow v., 20  
 Stock, Beasman v., 573  
 Stockdale v. Nicholson, 285, 286  
 Stocken v. Stocken, 368  
 Stocker v. Harbin, 56, 640  
 Stockford, Peacock v. (3 D. M. & G. 73), 241  
     — Peacock v. (7 D. M. & G. 129), 255  
 Stocks v. Barré, 145  
     — v. Dodaley, 287, 370  
 Stoddart v. Grant, 42  
     — v. Nelson, 258  
 Stokes v. Cheek, 389  
     — v. Heron, 391  
     — v. Holden, 93  
     — v. Salomons, 158  
 Stolworthy v. Sancier, 421  
 Stone's Estate, *In re*, 463  
 Stone, Crowder v., 503, 515, 521, 544  
     — v. Greening, 97, 166  
     — Lee v., 506  
     — Lowndes v., 277  
     — v. Maule, 532  
 Stonehewer, Best v., 263  
 Stoney, Loftus v., 157, 158  
     — Vize v., 411, 573  
 Stonor v. Curwen, 557  
 Stooke v. Stooke, 146  
 Storr, Newmarch v., 132, 133  
 Storril, Chalmers v., 88  
 Storrs v. Benbow, 248, 251, 436  
 Story, Baker v., 40, 577  
 Stoughton, Browne v., 432  
     — Lombe v., 155, 444  
 Stovin, Frank v., 344  
 Stow v. Davenport, 143  
 Stowell, Thomas v., 306  
 Stracey, *In bonis*, 12  
     — Harvey v., 174, 606  
 Strachan, Bridges v., 577  
 Strafford, Lord, Byng v., 478  
 Straker v. Wilson, 644  
 Stratford, Evans v., 457  
 Stratton, Butler v., 262  
     — Paine v., 371  
 Straus v. Goldsmid, 292  
 Streetfield v. Cooper, 153  
     — Smith v., 255  
 Street, May v., 612  
     — v. Street, 622  
 Stretch v. Watkins, 410  
 Stringer's Estate, *In re*; Jones-Ford, Shaw v., 376, 460, 473, 474  
 Stringer v. Gardiner, 209  
     — v. Harper, 133, 625  
     — v. Phillips, 509  
 Strode, Casamajor v., 533  
     — v. Falkland, Lady, 123  
     — Maberley v., 502, 529  
     — v. Russell, 167, 219  
 Strong v. Ingram, 118  
     — v. Teatt, 164  
 Strother v. Sutton, 412  
 Stroughill v. Anstey, 354, 361  
 Strugnell, Bolding v., 413  
 Struthers v. Struthers, 123  
 Strutton, Hooper v., 360  
 Stuart v. Bute, Marquis of, 184  
     — v. Cockerell, 434, 436  
 Stubbs, Hughes v., 9  
     — v. Sargon, 64, 383  
 Stummvoll v. Hales, 241  
 Sturge, A.-G. v., 301  
 Sturgess v. Pearson, 479  
 Sturt, Burt v., 446, 619  
 Styth v. Monro, 284  
 Suckling, Ingram v., 412  
 Suffolk, Earl of, Bindon, Lord, v., 483  
     — Countess of, Hobart v., 382  
     — Jones v., 450  
 Sugden, St. Leonards, Lord, 46, 47  
     — Stelfox v., 637, 638  
 Suisse v. Lowther, 117  
 Sullivan, Charitable Donations, Commissioners of, v., 299  
     — v. Edgell, 415  
     — v. Galbraith, 392  
     — Irvine v., 64, 381, 383  
     — v. Sullivan (3 L. R. Ir. 299), 29, 57  
     — v. Sullivan (I. R. 4 Eq. 457), 96, 208  
 Summers, *In bonis*, 26  
 Summerset, Roe v., 566  
 Sunderland, *In bonis*, 60  
 Surridge v. Clarkson, 262  
 Surtees v. Hopkinson, 582  
     — v. Surtees, 314  
 Susanni's Trust, *In re*, 251, 263, 321, 602  
 Sussex, Earl of, Leonard v., 337, 557, 560  
 Sutcliffe v. Howard, 255, 394  
     — Must v., 54  
     — v. Richardson, 450  
 Sutherland, Oceanic Steam Navigation Company v., 366  
 Sutherland, Casterton v., 251  
     — v. Cooke, 111, 202  
 Sutton, A.-G. v., 538  
     — Baker v., 306  
     — Cox v., 553  
     — Hasker v., 530  
     — Hotham v., 144, 185  
     — v. Jewks, 454

C

TABLE OF CASES.

- Sutton, Morrall v., 578  
 — Queen's College v., 105, 108  
 — v. Sadler, 14, 20  
 — v. Sharp, 186  
 — Strother v., 412  
 — v. Torre, 314  
 Swabey v. Goldie, 255  
 Swaine v. Kennerley, 226  
 Swallow v. Binns, 420  
 — v. Swallow, 636  
 Swan v. Holmes, 86  
 Swann, Johnson v., 304, 306, 303  
 Swannell, Martin v., 331  
 Swatman, Dickinson v., 38  
 Sweet, Dowset v., 208, 210  
 Sweetapple v. Bindon, 557  
 — v. Horlock, 423  
 Sweeting v. Prideaux, 554  
 — v. Sweeting, 313  
 Sweetland v. Sweetland, 23, 26, 30  
 Swift v. Nash, 55  
 — v. Swift (1 D. F. & J. 160),  
 165  
 — v. Swift (11 W. R. 334; 32  
 L. J. Ch. 479), 555  
 Swinburne, Berkeley v., 244, 385,  
 403  
 — v. Swinburne, 223, 225  
 Swindells, Parr v., 539  
 Swinden, *In bonis*, 33  
 Swiney, Haig v., 374  
 Swinfen v. Swinfen, 167, 183, 184,  
 186  
 Swinford, *In bonis*, 28  
 Swinhoe, Grissell v., 84  
 Swinstead, Taite v., 433  
 Sydenham, Tregonwell v., 432, 609  
 Sydney v. Sydney, 103  
 Sykes, *In bonis*, 32, 33  
 Sykes' Trusts, *Re*, 470  
 Sykes, Robinson v., 254  
 — v. Sheard, 358  
 — v. Sykes, 432, 611, 618  
 — Wrigley v., 362, 363, 632  
 Symes v. Green, 14  
 Symonds, Beale v., 612  
 — Green v., 122, 151  
 — v. Marine Society, 304  
 — v. Wilkes, 561  
 Symons v. James, 633, 634  
 Synge's Trust, 532  
 Synge v. Hales, 321  
 — v. Synge, 83
- TAAFFE v. Conmee, 502  
 Tabor v. Brooks, 367  
 Tagart v. Hooper, 43
- Taggart, Carter v., 113, 187  
 — v. Taggart, 321, 559  
 Tait, Gibbs v., 373  
 — v. Lathbury, 354  
 Taite v. Swinstead, 433  
 Taitt, M'Lachlan v., 409, 421  
 Talbot, Chandos, Duke of, v., 407  
 — v. Ferers, 447  
 — v. Marshfield, 369  
 — v. O'Sullivan, 382  
 — v. Radnor, Ld., 82  
 — v. Shrewsbury, Earl of (4 M.  
 & Cr. 672), 79  
 — v. Shrewsbury (Proc. Ch. 394),  
 592  
 — v. Talbot, 57  
 Talk, Hart v., 582  
 Talkner v. Grace, 640  
 Tancred, A.-G. v., 310  
 Tanfield, Mattison v., 277  
 Tanière v. Pearkes, 254  
 Tankerville, Earl of, Bennett v., 336,  
 338  
 Tann, *Re*, 205  
 Tanner, *Ex parte*; Tiverton Market  
 Act, *In re*, 319  
 Tapley v. Eagleton, 98, 101  
 Tapner v. Marlott, 273  
 Taprell, Stephens v., 45  
 Tapster v. Holtzappfell, 57  
 Tarbottom v. Eale, 637  
 Tarbuck v. Tarbuck, 483  
 Tarbut, Tilbury v., 473  
 Target v. Gaunt, 539  
 Tarsey's Trust, *In re*, 469  
 Tasker, Bradshaw v., 292  
 Taseell, Barnaby v., 182, 241, 246,  
 253, 255, 496  
 Tatching v. Barnett, 641  
 Tate v. Clark, 345, 373  
 Tatnam v. Drummond (2 H. & M.  
 262), 137  
 — v. Drummond (4 D. J. & S.  
 484), 308  
 — Eno v., 131  
 — v. Vernon, 190, 415  
 Tatlock, Finlason v., 500  
 — v. Jenkins, 577, 640  
 Tatnall v. Hankey, 1  
 Taunton, Adams v., 355  
 Tavernor v. Grindley, 225, 611  
 Tawney, Austin v., 457  
 — Rowland v., 408  
 Taylor, *In bonis*, 53  
 Taylor's Settlement, 193  
 Taylor, Austen v., 556  
 — v. Bacon, 385  
 — v. Beverley, 370, 509  
 — v. Cartwright, 597  
 — Chambers v., 269

- Taylor, Clark *v.* (1 Dr. 642), 298  
 — *v.* Clark (1 Ha. 161), 646  
 — Doe d. Harris *v.*, 537  
 — Doe d. Newton *v.*, 97  
 — Domville *v.*, 150  
 — Festing *v.*, 143  
 — Frayne *v.*, 205  
 — *v.* Frobisher, 408  
 — *v.* George, 381  
 — Gillam *v.*, 295  
 — Gossage *v.*, 330  
 — *v.* Graham, 421  
 — *v.* Harewood, Earl of, 548  
 — *v.* Haygarth, 612, 614  
 — Hepworth *v.*, 529  
 — Hindle *v.*, 555, 637  
 — Hope d. Brown *v.*, 152  
 — *v.* Johnson, 142  
 — King *v.*, 484  
 — *v.* Lambert, 407, 411  
 — Linley *v.*, 88, 305  
 — Maden *v.*, 328, 506, 511, 512, 571  
 — *v.* Mogg, 613  
 — Malcolm *v.*, 541  
 — Manning *v.*, 325  
 — *v.* Martindale, 388  
 — *v.* Meads, 16, 74, 466  
 — *v.* Richardson, 208  
 — *v.* Stainton, 467, 484  
 — *v.* Taylor (6 Sim. 246), 111, 632  
 — *v.* Taylor (10 Ha. 475), 119  
 — *v.* Taylor (8 Ha. 120), 142  
 — *v.* Taylor (3 D. M. & G. 190), 197  
 — *v.* Taylor (20 Eq. 155), 595  
 — *v.* Taylor (17 Eq. 324), 637, 638  
 — *v.* Topham, 458  
 — *v.* Walker, 546  
 — Wallis *v.*, 370  
 Taynton, Critchett *v.*, 239  
 Teague's Settlement, *In re*, 430, 440  
 Teague, Gould *v.*, 148, 204  
 Teale, Williams *v.*, 260, 441  
 Teape's Trusts, *In re*, 173, 174  
 Teasdale *v.* Braithwaite, 381  
 Tea't, Strong *v.*, 164  
 Tebbitt, Smith *v.*, 14  
 Tee *v.* Ferris, 65  
 Teed, Snow *v.*, 267, 275  
 Telford, Johnson *v.*, 90  
 Tempest, De Trafford *v.*, 183  
 — *v.* Tempest, 629  
 Templemoyle School, 297  
 Templer, Lewis *v.*, 422, 431, 547  
 — Waite *v.*, 286  
 Tench *v.* Cheese, 444, 640  
 Tennent *v.* Tennent, 163  
 Tennison *v.* Moore, 224  
 Tenny *v.* Agar, 324  
 Terrible, *In bonis*, 60, 62  
 Terry's Will, 266  
 Terry *v.* Terry, 156  
 Test, Deane *v.*, 106  
 Teulon, Thompson *v.*, 531  
 Tew, Kimberley *v.*, 422  
 Tewart *v.* Lawson, 445  
 Teynham, Lady, *v.* Lennard, 79  
 Thacker, Lindsell *v.*, 169  
 — Stanhope *v.*, 635  
 Thackeray *v.* Hampson, 490, 531  
 Thackwell, Moggridge *v.*, 117, 299, 301  
 Tharp, *In bonis*, 16, 66, 67  
 Tharp's Estate, *In re*, 504  
 Thatcher's Trust, *Re*, 408, 435  
 Theakston *v.* Marson, 55  
 Theebridge *v.* Kilburne, 371  
 Theed's Settlement, *Re*, 222, 223  
 Thellusson *v.* Bendlesham, 271  
 Theobald *v.* King, 200  
 Theiger, Manning *v.*, 114  
 Thetford School Case, 300  
 Thicknesse *v.* Liege, 533  
 Thirtle *v.* Vaughan, 170  
 Thistlethwayte's Trusts, 219  
 Thomas *v.* Bennett, 592  
 — *v.* Britnell, 632  
 — Butt *v.*, 563  
 — Doe d. Herbert *v.*, 376  
 — Ellison *v.*, 225  
 — Groom *v.*, 15  
 — *v.* Howell, 295, 296, 450, 578  
 — *v.* Jones, 73, 177, 179  
 — Loring *v.*, 239, 497  
 — Lowe *v.*, 144, 145  
 — Mather *v.*, 148  
 — Morgan *v.*, 120  
 — *v.* Phelps, 159  
 — Pogson *v.*, 98, 153  
 — Rogers *v.*, 145  
 — *v.* Stowell, 306  
 — *v.* Thomas (27 B. 537), 106  
 — *v.* Thomas (6 T. R. 671), 213  
 — *v.* Wall, 54  
 — *v.* Wilberforce, 409  
 — William d. Hughes *v.*, 163  
 Thompson's Trusts, *In re*, 275, 277  
 — Trusts, *Re* (22 B. 506), 93  
 — Trust, *Re* (2 W. R. 218; 5 D. M. & G. 280), 495, 498  
 — Trusts, *Re* (5 De G. & S. 667), 532  
 Thompson, Askew *v.*, 139  
 — Bibby *v.*, 385  
 — *v.* Browne, 9  
 — *v.* Burra, 87, 89  
 — Cawood *v.*, 309

- Thompson v. Clive, 499  
   — r. Corby, 294  
   — Driver v., 15  
   — v. Fisher, 557  
   — Forster v., 632  
   — Gowing v., 256, 496  
   — r. Grant, 169  
   — v. Griffin, 369  
   — Law v., 526  
   — r. Lawley, 165  
   — Lewthwaite v., 331  
   — Mann v., 248  
   — r. Robinson, 257  
   — r. Teulon, 531  
   — r. Thompson, 220, 298, 509, 584  
   — Todhunter v., 273  
   — r. Whitelock, 189, 284  
 Thomson, *In bonis*, 28  
 Thomson's Estate, *In re*, 74  
   — Estate, *In re*; Herring v. Barrow, 376, 474  
   — Trusts, 417  
 Thomson v. Shakespear, 92, 291, 430  
 Thorington, Sleech v., 105, 216  
 Thorley, Doe v., 78  
 Thornber v. Wilson (3 Dr. 245), 296  
   — v. Wilson (4 Dr. 350), 302  
 Thornburgh, Weatherall v., 447  
 Thornecroft v. Lashmar, 10  
 Thorne, *In bonis*, 12  
   — Dawson v., 617  
 Thorngate, Ramsay v., 387  
 Thorns, Davies v., 175  
 Thornton, Cooper v., 386  
   — v. Ellis, 199  
   — v. Hawley, 193  
   — v. Hilhouse, 683  
   — v. Howe, 290  
   — v. Kempeon, 304  
   — Lancaster v., 355  
   — Shadbolt v., 303  
   — r. Thornton (11 Ir. Ch. 474), 85  
   — r. Thornton (20 Eq. 599), 173, 174  
 Thorold v. Thorold, 10  
 Thorp, Law v., 373  
   — Lea v., 253  
   — r. Owen, 269, 385  
 Thorpe v. Bestwick, 94  
   — v. Thorpe, 270  
 Thrupp v. Collett, 215, 293, 299  
 Thruston, Hardwick v., 603  
 Thruxton v. A.-G., 612  
 Thurgood, Miller v., 86  
 Thurlow, Lethbridge v., 594  
   — Neighbour v., 393, 569  
 Thursby v. Thursby, 201  
 Thwaites v. Forman, 622  
   — Lambert v., 250, 251  
   — r. Over, 263  
 Thynne, Lady, v. Glengall, Earl of, 588, 589  
   — Lord, v. Stanhope, 37  
 Tibbets v. Tibbets, 382  
 Tickell, Robinson v., 386  
 Tickner v. Old, 193  
 Tidwell v. Ariel, 604  
 Tierney, Lassence v., 377, 378  
 Tiffin v. Longman, 264, 265  
 Tilbury v. Tarbut, 473  
 Tilley v. Simpson, 157, 158  
 Tilson v. Jones, 484  
 Timewell v. Perkins, 159, 183  
 Timins v. Stackhouse, 256, 500  
 Tinkler's Estate, *In re*, 648  
 Tipper, Sculthorpe v., 365  
 Titchfield, Marquis of, v. Horncastle, 160  
 Titley v. Wolstenholme, 75  
 Tiverton Market Act, *In re*; Tanner, *Ex parte*, 319  
 Todd v. Bielby, 621  
   — Coore v., 622  
   — v. Winchelsea, 29  
 Todhunter, Hewetson v., 284  
   — v. Thompson, 273  
 Tokelove, Hale v., 43, 60  
 Toldervy v. Colt, 477  
 Tollemache v. Coventry, Earl of, 488  
   — v. Tollemache, 645  
 Toller v. Attwood, 342, 351  
 Tollner v. Marriott, 451  
 Tolson v. Collins, 593  
   — v. Sheard, 366  
 Tombs v. Roch, 627  
 Tomkins, A.-G. v., 614  
   — v. Colthurst, 620  
   — v. Tomkins, 567  
 Tomkinson, Doe v., 73  
 Tomkyns v. Blane, 85  
 Tomlinson v. Dighton, 73  
   — Knapping v., 437  
   — Singleton v., 60, 63, 153, 195  
   — Wall v., 533  
 Tooker v. Annesley, 645  
 Tookey's Trust, *Re*, 539  
 Tootal's Estate, *In re*, 111, 623  
 Tootal, Parker v., 496, 537, 563, 582  
 Toovey v. Bassett, 327, 542  
 Topham, *In bonis*, 26  
   — Taylor v., 453  
 Toplis v. Baker, 602  
 Topp, Davies v., 620  
 Torin, Reynolds v., 88  
 Torre, *In bonis*, 23  
   — v. Browne, 142, 164, 636

- Torre v. Castle, 11, 55  
     — Sutton v., 314  
 Torrens v. Millington, 189, 190  
 Torres v. Franco, 420  
 Torret v. Frampton, 319  
 Torrington, Lady, Douce v., 632  
 Tothill v. Pitt, 371  
 Tourangeau, Renaud v., 459  
 Tournay, Porter v., 150  
 Tovey, *In bonis*, 61  
 Towell, Harvey v., 373  
 Tower v. Rous, Lord, 642  
 Townend v. Townend, 101, 102  
 Townley v. Bedwell, 204  
     — v. Bolton, 394  
     — v. Watson, 34  
 Towns v. Wentworth, 538  
 Townsend v. Early, 251  
     — Gosling v., 487, 489  
     — Mackintosh v., 310  
     — v. Martin, 105  
     — v. Townsend, 147  
     — v. Wilson, 357  
 Townshend v. Carus, 290  
     — Meyer v., 378, 604  
     — Lord, Wilson v., 83  
     — v. Windham, 215  
 Townie, Rogers v., 610  
 Tozer, *In bonis*, 37  
 Tracy v. Glover, 324  
     — Lethieullier v., 477  
 Trafford v. Ashton, 219, 635  
     — v. Berridge, 186  
     — v. Boehm, 546  
     — v. Trafford, 553  
 Traill, Perring v., 311  
 Trappes v. Meredith, 465  
     — Payne v., 46, 59  
     — Tunstall v., 566  
 Travers v. Blundell, 99  
     — Miller v., 100  
     — v. Travers, 613  
     — Warren v., 344  
 Travis v. Milne, 366  
 Treeby, *In bonis*, 34  
 Treffry, Meredith v., 220  
 Trego, Hayter v., 296, 299  
 Tregonwell v. Sydenham, 432, 609  
 Treharne v. Layton, 533  
 Tremamondo, Goodenough v., 202  
 Trent v. Hanning, 346  
 Trestrail v. Mason, 133  
 Tretthewy v. Helyar, 287, 619, 624  
 Trevanion, *In bonis*, 30  
 Trevelyan v. T., 11  
 Trevor v. Trevor, 557  
 Tribber, Hartley v., 228  
 Tribe, Green v. (9 Ch. D. 231), 44,  
     60  
 Tribe, Green v. (27 W. R. 39), 136,  
     576  
     — Hart v., 385  
     — v. Newland, 510  
     — v. Tribe, 29  
 Tricker v. Kingsbury, 455  
 Trickey v. Trickey, 447, 518, 541  
 Trig, Day v., 166  
 Trigg, Harland v., 380  
 Trimmell v. Fell, 17  
 Trinder, *In bonis*, 28  
     — v. Trinder, 102, 106  
 Trinity College, A.-G. v., 300  
     — Hall, Andrew v., 82  
 Trimnell, *In bonis*, 29  
 Tripp, Evans v., 102  
 Tristram, Barrington v., 239  
 Trollope, Dubber d. Trollope v., 342  
     — v. Routledge, 626  
 Trotter, Crawford v., 317  
     — v. Oswald, 543  
     — v. Williams, 484  
 Troutbeck v. Boughey, 466  
 Trower v. Butts, 249  
     — v. Knightley, 359  
 Truell v. Tysson, 358, 610  
 Truro, *In bonis*, Lady, 61  
 Truscott, Carlyon v., 348, 359  
 Truwhitt, Hance v., 89  
 Trye v. Gloucester, Corporation of,  
     310  
 Tuck, Carden v., 155  
     — Edwards v., 192, 446  
 Tucker, Baker v., 538  
     — v. Billing, 263  
     — Curnick v., 384  
     — Hayter v., 305  
     — Jones v., 171, 175  
     — v. Kayess, 608  
     — Morse v., 630  
 Tuckerman v. Jeffries, 394  
 Tuckett, Wright v., 643  
 Tuckey v. Henderson, 115  
 Tudor v. Tudor, 54  
 Tuesbury, Doe d. Todd v., 538  
 Tufnell v. Borrell, 318, 329, 504  
 Tugman, Breedon v., 410  
 Tugwell, Barnett v., 231  
     — Jebb v., 201  
     — v. Scott, 233  
 Tuite, Birmingham v., 221, 225  
 Tulk v. Houlditch, 451  
 Tullett v. Armstrong, 470  
 Tunaley v. Roch, 568  
 Tunstall, Morley v., 619  
     — v. Trappes, 566  
 Tupper v. Tupper, 40, 577  
 Turke v. Frenchman, 538  
 Turner, *In bonis*, 43

- Turner, *Re* (2 Dr. & Sm. 501), 283,  
     284  
     — *Re* (30 L. J. Ch. 144; 9 W. R.  
        174; 2 D. F. & J. 527), 346  
     — *Re* (34 L. J. Ch. 660), 498,  
        499  
     — *v. A.-G.*, 72  
     — Brooke *v.*, 151, 442  
     — *v. Buck*, 137  
     — Castledon *v.*, 211  
     — Cooke *v.*, 451, 452  
     — *v. Frampton*, 345  
     — *v. Hudson*, 253, 422  
     — Hughes *v.*, 175  
     — Jenner *v.*, 454  
     — *v. Martin*, 603  
     — Marwood *v.*, 123  
     — *v. Moor*, 484  
     — *v. Mullineux*, 143  
     — Penny *v.*, 491  
     — Quennell *v.*, 102, 639, 642  
     — Sadler *v.*, 617  
     — *v. Sargent*, 561  
     — *v. Turner* (21 L. J. Ch. 843),  
        148, 166  
     — *v. Turner* (28 W. R. 859; 14  
        Ch. D. 829), 151  
     — *v. Turner* (30 B. 414), 359  
     — *v. Turner* (Amb. 776; 1 B. C. C.  
        316), 388  
     — White *v.*, 599  
     — *v. Whittaker*, 254  
     — *v. Wright*, 645  
     — Young *v.*, 533  
 Turquand, Ricketts *v.*, 96  
 Turton, Lambard *v.*, 550  
 Turvin *v. Newcome*, 438  
 Tussaud's Estate, *In re*, 586, 557, 590  
 Tweedale, *In bonis*, 55  
     — *v. Tweedale*, 456, 570  
 Twigg, Bryan *v.*, 395  
 Twining, Britton *v.*, 872  
     — *v. Powell*, 597  
 Twist *v. Herbert*, 506  
 Twohill, *In re*, 209  
 Twopenny *v. Peyton*, 461  
 Twyford, East *v.*, 341  
 Tyerr, Savage *v.*, 378  
 Tylden *v. Hyde*, 360  
 Tyler, Fontaine *v.*, 105, 108  
     — Greville *v.*, 33  
     — *v. Luke*, 467  
 Tyley, Williams *v.*, 45  
 Tyndale *v. Wilkinson*, 252  
 Tyndall, *Re*, 637  
     — Colman *v.*, 351  
 Tyrer, Follett *v.*, 466  
     — Onions *v.*, 37, 38, 46, 577  
 Tyrone, Earl of, *v. Waterford*, Marquis  
     of, 151, 160, 334  
 Tyrrell *v. Whinfield*, 304  
 Tysson, Truell *v.*, 358, 610  
 Tytherleigh *v. Harbin*, 495  
 UDNY *v. Udney*, 3, 7  
 Ulrich *v. Lichfield*, 578  
 Umbers *v. Jaggard*, 221, 222, 549  
 Underhill *v. Roden*, 315, 332  
 Underwood *v. Wing*, 603  
 United States, President of, *v. Drum-*  
     mond, 5  
 Unsworth *v. Speakman*, 493, 604, 605  
 Unwin, Woodgate *v.*, 320  
 Upfill *v. Marshall*, 44  
 Upsall, Hickman *v.*, 636  
 Upton, Briggs *v.*, 285, 286  
     — *v. Brown*, 280  
     — *v. Hardman*, 535  
     — *v. Prince*, 597  
     — Procter *v.*, 371  
     — *v. Vanner*, 636  
 Urquhart *v. King*, 615, 617  
     — *v. Urquhart*, 281  
 Usticke, *Re*, 507  
     — Beauchant *v.*, 219, 333  
     — *v. Peters*, 87  
 Uthwait, Bellasis *v.*, 583  
 Utterton *v. Robins*, 62  
 VACHELL, Breton *v.*, 612  
     — *v. Roberts*, 200  
 Vaisey *v. Reynolds*, 147, 148, 151  
 Vallance, Simmons *v.*, 104  
     — *v. Vallance*, 167  
 Vallier, Rigden *v.*, 9  
 Vallins, Mellish *v.*, 131  
 Valpy, Lemprière *v.*, 172  
 Van *v. Barnett*, 194  
 Vanderboom, Birkett *v.*, 15  
 Vanderplank *v. King*, 320, 430, 441,  
     572  
 Vanderstegen, Vaughan *v.*, 36  
 Vane, Earl, *v. Rigden*, 364  
 Van Goor, Isaacson *v.*, 566  
 Van Hagen, *In re*; Sperling *v. Roch-*  
     fort, 181  
 Vanner, Upton *v.*, 636  
 Vansittart, Wilson *v.*, 317  
 Van Straubenzer *v. Monk*, 60  
 Varah, Wake *v.*, 594, 505  
 Vardy, Bull *v.*, 570  
 Varley, Warbrick *v.*, 143, 452  
     — *v. Winn*, 486  
 Varlo *v. Faden*, 445, 644  
 Vaudrey *v. Howard*, 190  
 Vaudry, Cartwright *v.*, 228



- Vaudry v. Geddes, 414  
 Vaughan v. Buck, 201  
   — v. Burslem, 552  
   — v. Headfort, Marquis of, 315  
   — M'Kechnie v., 242  
   — Mansell v., 357  
   — Sandford v., 55  
   — Smith v., 422  
   — Thirtle v., 170  
   — v. Vanderstegen, 36  
   — Walmsley v., 600  
 Vause, Drant v., 204  
 Vautier, Saunders v., 412, 461  
 Vaux v. Henderson, 274, 283  
 Venables, Look v., 134  
   — v. Morris, 350, 557  
 Venes v. Marriott, 216  
 Verdon, Greenwood v., 534, 544  
 Vere, Griffiths v., 445  
 Vernon, Acherley v., 400  
   — Dos d. Conolly v., 97  
   — v. Manners, Earl, 618  
   — Salkeld v., 589  
   — Seymour v., 461  
   — Tatham v., 190, 415  
   — v. Wright, 271  
 Verschoyle's Trusts, *In re*, 421  
 Vesey v. Jameson, 298, 614  
 Vicars, Billingham v., 20  
   — Booth v., 235, 286  
 Vick v. Edwards, 320  
   — v. Sueter, 326  
 Vickers, Pierson v., 338  
   — v. Pound, 109, 150  
   — Simpson v., 458  
 Vigor, A.-G. v., 162, 273  
 Vile, Rackstraw v., 543  
 Vincent, Cattley v., 477  
   — Courtney v., 143  
   — Habergham v., 10, 64  
   — v. Lee, 357  
   — Maugham v., 279  
   — v. Newcombe, 201  
   — Pearce v., 264  
   — v. Spicer, 645  
 Vinke, Eastwood v., 592, 593  
 Vinnicomb v. Butler, 23  
 Violet v. Brookman, 456  
 Vitty, White v., 161  
 Vivian v. Jegon, 351  
   — v. Mills, 416  
   — v. Mortlock, 113  
 Vizard's Trusts, 423  
 Vize v. Stoney, 411, 573  
 Voice, Papillon v., 557  
 Von Donop, Sheffield v., 102  
 Vorley v. Richardson, 509, 513  
 Vye, Jarman v., 534, 544  
 Vynior's Case, 12  
 WADDELL, Ancona v., 465  
 Waddelow, Robinson v., 267  
 Wade, Birch v., 265, 376  
   — Cole v., 265  
   — Gery v. Handley, 444, 610  
   — v. Nazer, 44  
 Wadkin, Barrow v., 93  
 Wadley v. North, 413  
 Wadman, Corneck v., 510  
 Wadsworth, Bortoft v., 247  
   — Nicolson v., 355  
 Wagner, Payne v., 218  
 Wagstaff v. Crosbie, 479  
   — v. Smith, 471  
   — v. Wagstaff, 162  
 Wagster, Cooke v., 145  
 Wahlstatt, Countess de, A.-G. v., 3  
 Waineright, Doe v., 504  
 Wainman v. Field, 190, 438  
 Wainwright, Barclay v. (3 Ves. 462),  
   115, 116  
   — Barclay v. (14 Ves. 66), 644  
 Waite v. Combes, 145, 147  
   — v. Littlewood, 504  
   — v. Morland, 185  
   — v. Templer, 286  
 Wake v. Varah, 504, 505  
 Wakefield v. Dyott, 513  
 Wakeford, Wright v., 24  
 Wakeham, *In bonis*, 76  
   — v. Merrick, 391  
 Wakeman, Collier v., 194  
 Walbank, Doe d. Keen v., 351  
 Walcot v. Botfield, 458  
 Walcott, Clogstoun v., 174  
 Walden, Cooch v., 97  
 Waldo v. Cayley, 302  
   — v. Waldo, 646  
 Waldon v. Boulter, 261  
 Waldron, Breslin v., 215  
 Walker, *In bonis*, 25  
   — *In re*; Church v. Tyacke,  
   505  
   — *Ex parte*, 205  
   — v. Armstrong, 45  
   — Bengough v., 588  
   — v. Camden, Marquis of, 281,  
   285  
   — v. Denne, 194, 612  
   — Ellis v., 109  
   — Evans v., 392, 435  
   — v. Hardwick, 639  
   — v. Inge, 81  
   — v. Jackson, 641  
   — Macdonald v., 75  
   — v. Main, 520, 521, 523  
   — v. Makin, 285  
   — v. Milne, 305  
   — v. Mower, 410, 417, 540  
   — Roberts v., 93, 640

- Walker, Robertson *r.*, 358  
   — Roe d. Walker *r.*, 155  
   — *r.* Shore, 246  
   — *r.* Simpson, 416, 419  
   — *r.* Smallwood, 360  
   — *r.* Smith, 21  
   — Taylor *r.*, 546  
   — *r.* Walker (2 Curt. 854), 56  
   — *r.* Walker (1 Ves. sen. 54), 88  
   — *r.* Walker (2 D. F. & J. 255), 450  
   — Woodmeston *r.*, 389, 470  
 Walkey, Stebbing *r.*, 242  
 Wall, Baker *r.*, 272, 329  
   — Bishop *r.*, 17  
   — *r.* Bright, 170  
   — *r.* Colshead, 195  
   — Isaac *r.*, 649  
   — Thomas *r.*, 54  
   — *r.* Tomlinson, 533  
 Wallace *r.* Anderson, 463  
   — *r.* A.-G., 290  
   — Auldjo *r.*, 554  
   — M'Dermott *r.*, 394  
   — *r.* Seymour, 576  
 Wallinger *r.* Wallinger, 82  
   — Walsh *r.*, 74, 251  
 Wallis, Lawrence *r.*, 16  
   — Onslow *r.*, 612  
   — *r.* Taylor, 370  
 Wallscourt, Aldridge *r.*, 642  
 Walmesley *r.* Gerard, 549  
 Walmsley *r.* Foxall, 318, 394  
   — *r.* Vaughan, 600  
 Wallop *r.* Derby, 579  
 Walpole *v.* Apthorp, 112, 113  
   — Crisp *r.*, 53  
   — *r.* Laulet, 408  
   — Lord, *r.* Orford, Earl of, 13, 43, 59  
 Walsh's Trusts, *In re*, 173  
 Walsh, Charitable Donations, Commissioners of, *r.*, 293  
   — *r.* Gladstone, 292  
   — Mullalby *r.*, 182, 183  
   — Nowlan *r.*, 375  
   — Sinnott *r.*, 73, 251, 267  
   — *r.* Wallinger, 74, 251  
   — *r.* Walsh, 115, 293, 299, 619  
 Walshaw, Fielding *v.*, 9, 10  
 Walter *r.* Drew, 543, 563  
   — *r.* Mackie, 176  
   — *r.* Maunde, 263  
 Walters, Collier *r.*, 351  
   — Meinertzen *r.*, 595  
 Wandesforde *r.* Carrick, 548  
 Warbrick *v.* Varley, 143, 452  
 Warburton, Blinston *r.*, 324, 543  
   — *r.* Farn, 357  
 Warburton *r.* Warburton, 634  
 Warbuton *r.* Warbuton, 88  
 Ward's Trust, *Re*, 386  
 Ward, A.-G. *r.*, 55, 578  
   — Andree *r.*, 540  
   — Avelyn *r.*, 481  
   — Davey *r.*, 367  
   — *r.* Devon, 360  
   — Greene *r.*, 568  
   — *r.* Grey, 153, 315  
   — Kenworthy *r.*, 318  
   — Kinch *r.*, 337  
   — Raikes *r.*, 379  
   — Samuel *r.*, 586  
   — Spencer *r.*, 242  
   — *r.* Ward, 322  
   — Waring *r.*, 639  
 Warde, Bristow *r.*, 442  
 Wardell, Froggatt *r.*, 316  
 Warden, *In bonis*, 28  
 Wardle *r.* Clanton, 468  
 Wardroper *r.* Cutfield, 406  
 Ware *v.* Mallard, 384  
   — *r.* Polhill, 433  
   — *r.* Rowland, 281  
   — *r.* Watson, 489, 518  
 Waring *r.* Coventry, 433  
   — *r.* Ward, 639  
   — *r.* Waring, 14, 15  
 Warner, *In bonis*, 61  
   — Matthews *r.*, 55  
   — *r.* Warner, 226  
   — Wheeler *r.*, 456  
 Warnoch's Estate, *In re*, 630  
 Warren, Daniel *r.*, 203  
   — *r.* Davies, 633  
   — Flint *r.*, 197  
   — Giles *r.*, 86  
   — Hall *r.*, 15  
   — *r.* Newton, 152  
   — *r.* Postlethwaite, 626  
   — *r.* Rudall, 481  
   — *r.* Rudell, 82  
   — *r.* Travers, 344  
   — *r.* Warren, 586  
   — Wright *r.*, 125, 136  
 Warrender *r.* Warrender, 4  
 Warrington *r.* Warrington, 218  
 Wartnaby, *In bonis*, 22  
 Warwick, Earl of, Brooke, Lord, *r.*  
   (2 De G. & S. 425), 122  
   — Earl of, Brooke, Lord, *r.* (1 H. & T. 142), 639  
 Wass, Rawlinson *r.*, 271  
 Wasse *r.* Helsington, 633  
 Waterford, Marquis of, Tyrone, Earl of, *r.*, 151, 160, 334  
 Waterhouse, Bevan *r.*, 126  
   — Hall *r.*, 16  
   — *r.* Holmes, 307

- Waterman, Dobson v., 102  
 Waters, Graves v., 573  
   — Lewis v., 477  
   — Lewis d. Ormond v., 323, 536  
   — v. Waters, 484  
   — Williams v., 348  
   — v. Wood, 102  
 Wathen v. Smith, 594  
 Watkins, *In bonis*, 60, 61, 63  
   — Alpess v., 330  
   — Gravenor v., 328, 578  
   — Harris v., 633  
   — Stretch v., 410  
   — v. Weston, 375, 377  
   — v. Williams, 460, 473  
 Watkinson, Long v., 286  
 Watmough's Trusts, 307  
 Watney, Slaney v., 287  
 Watson's Trust, *In re*, 533  
 Watson v. Arundell (I. R. 10 Eq. 299), 186  
   — v. Arundell (I. R. 11 Eq. 53), 195  
   — v. Brickwood, 640  
   — v. England, 514  
   — v. Hayes, 382, 414  
   — Horsepool v., 284  
   — Leckey v., 123  
   — v. Pearson, 349  
   — v. Reed, 115  
   — Richardson v. (1 Nev. & M. 575), 95  
   — Richardson v. (4 B. & Ad. 787), 101, 212  
   — Scawin v., 378  
   — Shelton v., 557  
   — Sidebotham v., 109, 346  
   — Southcot v., 615  
   — v. Spratley, 305  
   — Townley v., 34  
   — Ware v., 489, 518  
   — v. Watson, 595  
 Watt v. Wood, 446  
 Wattier, Davies v., 636  
 Watts, Duncan v., 621  
   — Eaton v., 381  
   — v. Steere, 644  
   — v. Watts, 205, 206  
 Wauchope, Winchelsea v., 29  
 Waugh v. Waugh, 498  
 Want v. Stallibrass, 355  
 Wax Chandlers, A.-G. v., 300, 382, 398  
 Way, House v., 202  
   — Page v., 463  
 Wayman, Peppercorn v., 356  
 Weakley d. Knight v. Rugg, 533  
 Weale v. Olive, 375, 376  
   — v. Rice, 589  
 Wearing v. Wearing, 200  
 Weatherall v. Thornburgh, 447  
 Weatherby, Doe d. Cholmondeley, Lord, v., 163  
 Webb, *In bonis* (3 Sw. & T. 482; 10 Jur. N. S. 709), 11  
   — *In bonis* (1 Jur. N. S. 1096), 29  
 Webb, Atkinson v., 592, 593  
   — v. Byng (1 K. & J. 580), 96, 98  
   — v. Byng (4 W. R. 657; 2 K. & J. 669), 154  
   — v. De Beauvoisin, 618, 625  
   — Doe d. Gorges v., 571  
   — v. Grace, 399  
   — v. Hearing, 324, 405  
   — v. Honnor, 175  
   — v. Sadler, 370, 377  
   — v. Shaftesbury, Earl of, 83  
   — v. Webb, 444  
   — v. Woods, 385  
 Webber v. Corbett, 212  
   — Doe v., 532  
   — Doe d. Smith v., 543  
   — v. Stanley, 97  
 Weber, Fitch v., 197, 611  
 Webster, Allen v., 233  
   — A.-G. v., 291  
   — v. Boddington, 437, 438  
   — Fisher v., 316, 541  
   — v. Hale, 104, 105, 138  
   — Herbert v., 437  
   — Moore v., 466  
   — v. Parr, 544  
   — Whistler v., 85  
 Weddell v. Mundy, 531  
 Wedgwood v. Denton, 123, 450  
 Weeding, Machell v., 563  
   — v. Weeding, 204  
 Weedon, Stillman v., 179  
 Weeds v. Bristow, 258  
 Weekes, Garrett v., 247, 249  
 Weigall v. Broome, 164  
 Welby v. Rockcliffe, 110, 639, 643  
   — v. Welby, 87  
 Welch, Dalzell v., 259  
   — Billing v., 459  
 Weld v. Bradbury, 243, 244  
   — Croly v., 636  
 Weldon v. Bradshaw, 153  
   — v. Hoyland, 254, 259  
 Wellbeloved v. Jones, 301  
 Wellesley, Cowley, Earl, v., 645, 646  
 Wellington v. Wellington, 56, 542  
 Wells' Estate, *In re*, 223  
 Wells v. Barwick, 621, 622  
   — Cooper v., 467  
   — Johnson v., 57  
   — Knox v., 217, 418  
   — v. Palmer, 270

- Wells v. Row, 641  
   — v. Wells (20 Eq. 342), 255  
   — v. Wells (18 Eq. 504), 257  
   — v. Wells (2 W. R. 6; 17 Jur. 1020), 576  
   — v. Wilson, 56  
 Wellstead, *In re*, 400  
 Wellsted, Martin v., 307  
 Welply v. Cormick, 378  
 Welsh, Mullally v., 157  
 Wenlock, *In bonis*, 55  
 Wentworth, Towns v., 533  
 West, *In bonis*, 29  
   — *Ex parte*, 513, 516  
   — Edwards v., 204  
   — Hamilton v., 339, 340, 344  
   — Holmesdale, Viscount v., 550, 556  
   — Horwood v., 382, 384  
   — v. Ireland, Lord Primate of, 220  
   — v. Lawday, 98, 619  
   — v. Miller, 522  
   — v. Moore, 151  
   — Mortimer v. (3 Russ. 370), 226  
   — Mortimer v. (2 Sim. 274), 56, 442  
   — v. Orr, 497  
   — Plenty v. (2 Phillim. 264), 42  
   — Plenty v. (6 C. B. 201; 16 B. 175), 346  
   — v. Ray, 74  
   — v. Shuttleworth, 292, 293  
   — v. West, 412, 490  
 Westby, Shirt v., 137  
 Westcomb, Jones v., 481, 482, 616  
 Westcott, Beard v., 435, 442  
   — Bradley v., 171, 376  
 Weston, *In bonis*, 37, 38  
   — Heath v., 153  
   — Salvin v., 638  
   — Watkins v., 375, 377  
   — Wright v., 113  
 Westropp, Hare v., 579  
 Westwood, Hinchcliffe v., 283, 284  
   — v. Southey, 413, 539, 545  
 Wetherall, McEnally v., 324  
   — v. Wetherall, 417  
 Wetherell v. Wetherell, 88  
 Wetherill, Hindson v., 21  
 Wharrey, Frogmorton d. Robinson v., 330  
 Wharton v. Barker, 281, 282  
   — Durham, Ld., v., 596  
   — v. Gresham, 335  
 Wheateley v. Spooner, 597  
 Whatford v. Moore, 418, 419  
 Whatley, Bricker v., 218  
 Whatton, Padmore v., 46  
 Wheable v. Withers, 487  
 Wheate, Burgess v., 612  
   — v. Hall, 359  
 Wheateley v. Davies, 142  
 Wheeler, *In bonis*, 45  
   — v. Adams, 282  
   — v. Bingham, 455  
   — v. Claydon, 631  
   — Craig v., 202  
   — v. Howell, 634  
   — v. Warner, 456  
 Wheelwright, Robinson v., 400  
 Whicker v. Hume, 7, 290, 310  
   — v. Mitford, 241  
 Whieldon, Gordon v., 218  
   — McCarogher v., 587  
 Whinfield, Tyrrell v., 304  
 Whinyates, Christmas v., 33  
 Whistler v. Webster, 85  
 Whitaker, Henvell v., 633  
   — Selby v., 408  
 Whitan, Reynolds v., 207  
 Whitbread, Freman v., 646  
   — Macnab v., 379  
   — v. St. John, 251  
 Whitby, Chidgey v., 140  
   — Goodtitle v., 350  
   — Goodtitle d. Hayward v., 402  
 Whitcher v. Penley, 493  
 Whitchurch, A. G. v., 307  
 Whitcomb v. Whitcomb, 4  
 Whitcombe, Pope v. (3 Mer. 689), 264, 265  
   — Pope v. (3 Russ. 124), 511  
 White, *In bonis* (2 N. of C. 461), 31  
   — *In bonis* (30 L. J. P. 55), 33  
   — *In re*, 45, 46  
 White's Trusts, 250, 321, 491  
 White and Hindle's Contract, *In re*, 336  
 White, Acton v., 471  
   — Baker v., 347, 348, 349, 514  
   — v. Barber, 240  
   — Barrett v., 145  
   — v. Beach, 100  
   — v. Briggs, 266, 321, 381, 560  
   — v. British Museum (6 Bing. 310), 29  
   — British Museum v. (2 S. & St. 595), 302  
   — Bryan v., 22  
   — v. Carter, 558  
   — v. Chitty, 465  
   — v. Collins, 342  
   — v. Coram, 325  
   — v. Cordwell, 123  
   — v. Driver, 15  
   — Dunnage v., 158  
   — v. Evans, 304, 617  
   — Goodright v., 270

- White v. Herrick, 471  
   — v. Hight, 533  
   — v. Hill, 532  
   v. Lake, 152  
   — v. M'Dermot, 457  
   — Moase v., 167  
   — Pery v., 571  
   — v. Repton, 52  
   — Reynolds v., 54  
   — v. Springett, 278, 282  
   — v. Turner, 599  
   — v. Vitty, 161  
   — v. White (7 Ves. 423), 295  
   — v. White (1 B. C. C. 12), 299  
   — v. White (2 Vern. 43), 639  
   — v. White (9 Ves. 557), 649  
   — v. Williams, 617  
   — Wood v., 359  
 Whiteacre, *Ex parte*, 149  
 Whitehead, Rhodes v., 244, 404,  
   474  
   — v. Whitehead, 185  
 Whitehorne v. Harris, 263  
 Whitehouse v. Insole, 622  
 Whiteley v. King, 47  
 Whitelock v. Heddon, 259, 272  
   — Thompson v., 189, 284  
 Whiteway, Brown v., 351  
   — v. Fisher, 577  
   — Forrest v., 318  
 Whitfield v. Langdale (1 Ch. D. 61),  
   96, 99  
   — Langdale v. (4 K. & J. 426),  
   146  
   — Rich v., 194  
 Whiting v. Force, 526  
   — v. Wilkins, 342  
 Whitley, Crook v., 257, 496  
 Whitlock, Asher v., 72  
 Whitman v. Aitken, 526  
 Whittaker, Horton v., 478  
   — Turner v., 254  
   — v. Whittaker, 204  
 Whittam, Benson v., 385  
 Whittell, Allbuser v., 646, 647  
   — v. Dudin, 378  
 Whittemore v. Whittemore, 352  
 Whitter v. Bremridge, 403  
 Whittle, Moores v., 633  
 Whittton v. Field, 509  
 Whorwood, A.-G. v., 311  
 Whyte v. Whyte, 116  
 Wickett, Gulliver v., 481  
 Wickham, Heath v., 469  
   — v. Wickham, 645  
   — v. Wing, 463  
 Wicklow, Earl of, Lindsay v., 134  
 Widdrington, *In bonis*, 62  
 Widmore v. Woodroffe, 295, 310  
 Wigan v. Rowland, 94  
 Wigg v. Nicholl, 628  
   — v. Wigg, 604  
 Wiggington, Hearne v., 182  
 Wight, *In re*; Knowles v. Sadler,  
   118  
   — *In re*; Sadler, Knowles v., 118  
   — v. Leigh, 539  
 Wightman, Pottinger v., 4  
 Wilberforce, Thomas v., 409  
 Wilce v. Wilce, 159  
 Wilcock's Settlement, *In re*, 463  
 Wild's Case, 332, 333, 334, 335  
 Wild v. Reynolds, 605  
 Wilday v. Barnett, 178  
   — v. Sandys, 193  
 Wildbore v. Gregory, 172, 177  
 Wilder's Trusts, 555, 603  
 Wilder, Blatch v., 360  
 Wildes v. Davies, 153, 288, 446, 448  
   — Piggott v., 555  
 Willinson, A.-G. v., 172  
 Wilkes v. Collin, 146, 167  
   — Symonds v., 561  
 Wilkin, Wright v., 398  
 Wilkins, Bland v., 608  
   — v. Jodrell, 150, 391, 396, 495  
   — Whiting v., 342  
 Wilkinson, *Ex parte*, 637  
   — *Re*, 178  
   — v. Adam, 55, 226, 231, 233, 240  
   — v. Barber, 302, 310  
   — Brandstrom v., 412  
   — v. Dent, 82, 86  
   — v. Duncan (23 B. 469), 199, 200,  
   647  
   — v. Duncan (30 B. 111), 437  
   — v. Joughin, 215  
   — v. Lindgren, 290  
   — Scammell v., 15  
   — v. Schneider, 180  
   — v. South, 543  
   — Tyndale v., 252  
   — v. Wilkinson, 450  
 Wilks v. Williams, 568  
 Willan, Doe d. Tomkyns v., 351  
   — v. Lancaster, 632  
 Willard, Cole v., 594  
 Willasey, Guest v., 62  
 Willes v. Douglas, 254, 591  
 Willett, Bryden v., 260, 538  
 Willetts, Adshead v., 331, 478  
 William d. Hughes v. Thomas, 163  
 Williams, *In bonis*, 25  
   — *Ex parte*, 73  
   — *In re* (5 Ch. D. 735), 585  
   — *Re* (16 B. 317), 522, 523  
   — v. Arkle, 288, 614  
   — Armitage v., 247, 248, 252  
   — v. Ashton, 33, 277  
   — A.-G. v., 308, 309

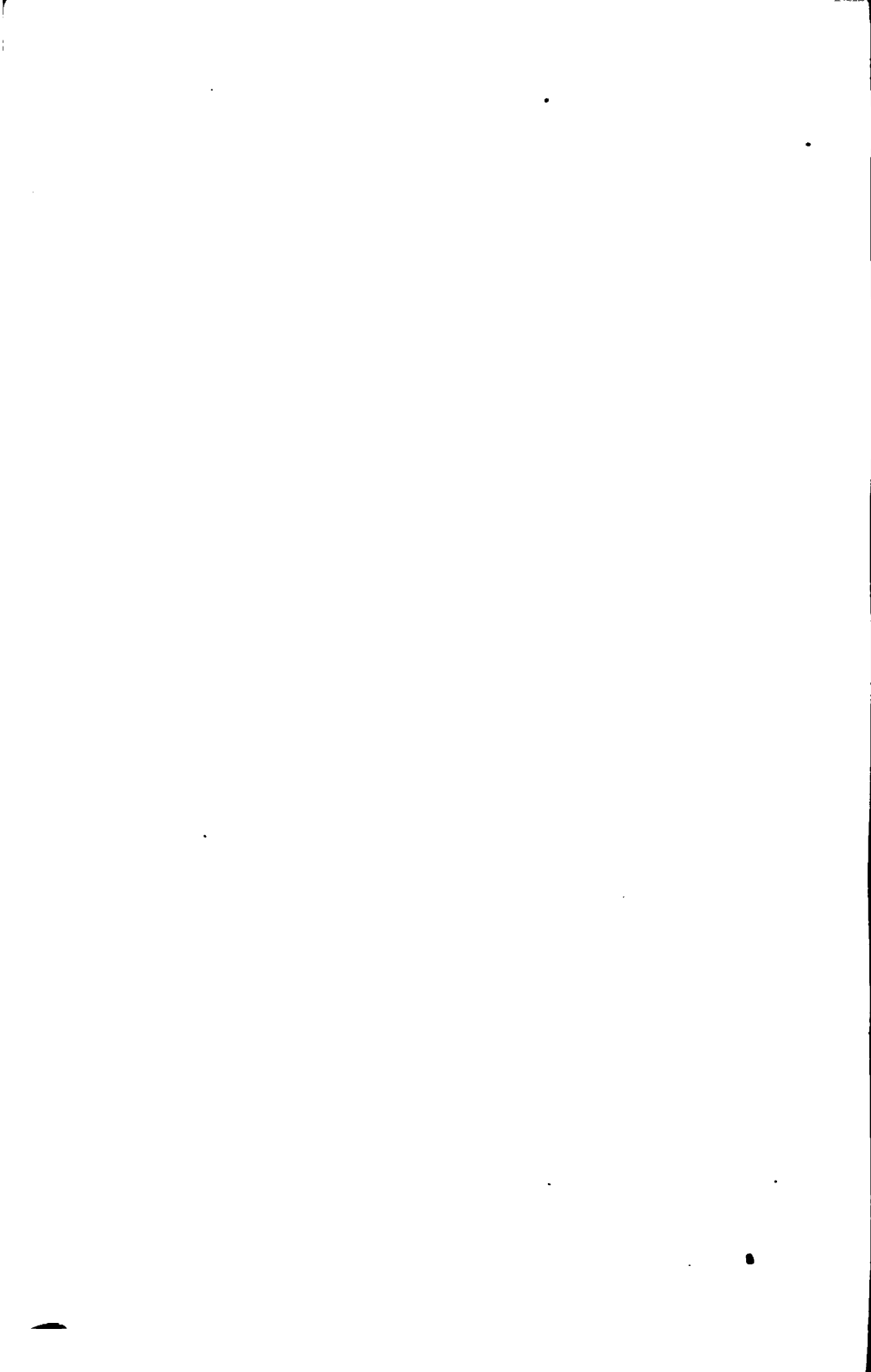
- Williams, Biddulph v., 181  
   — Bland v., 416, 417  
   — Boys v., 107  
   — Brickenden v., 180  
   — v. Chitty, 482, 620  
   — v. Clark, 410  
   — v. Corbet, 380  
   — Courtney v., 123  
   — Coventry v., 11  
   — v. Dormer, 4  
   — Gyett v., 622, 634  
   — r. Haythorne, 409, 420  
   — r. Hughes, 111  
   — Hugo v., 337, 442  
   — v. James, 504  
   — v. Jones, 617  
   — v. Kershaw, 298  
   — Kevern v., 247  
   — Knapp v., 304  
   — Laundry v., 142  
   — v. Lewis, 371  
   — Lloyd v., 139  
   — v. Lomas, 624  
   — v. Mayne, 83  
   — Mendham v., 522, 523  
   — v. Owen, 98  
   — v. Roberts, 383, 569  
   — v. Russell, 409, 420  
   — Skirving v., 203  
   — South v., 602  
   — v. Teale, 260, 441  
   — Trotter v., 484  
   — v. Tyley, 45  
   — v. Waters, 348  
   — Watkins v., 460, 473  
   — White v., 617  
   — Wilks v., 568  
   — v. Williams (8 Ch. D. 789),  
     146  
   — v. Williams (1 Sim. N. S. 358),  
     267, 380  
   — v. Wilson, 142  
 Williamson, Heardson v., 352  
   — v. Moore, 257  
   — v. Naylor, 603  
 Willing v. Baine, 482  
 Willis v. Hiscox, 342, 450  
   — v. Keymer, 383  
   — v. Lucas, 326  
   — v. Plaskett, 146, 500  
   — Radford v., 217, 527  
 Willmott, *In bonis*, 61, 63  
 Willmott's Trust, 524  
 Willock v. Noble, 15, 17  
   — Seaward v., 442  
   — Smither v., 479  
 Willomier's Trusts, *In re*, 271  
 Willoughby, Fowler v., 110  
 Willox v. Rhodes, 110  
 Wills v. Bourne, 629  
 Wills, Fenton v., 619  
 Wills, Hensley v., 395  
   — v. Sayer, 467  
   — v. Wills, 383  
 Willshire, Hayden v., 261  
 Willson v. Leonard, 630  
 Wilmot, *Re*, 173  
   — Cope v., 584  
   — v. Jenkins, 623  
   — v. Wilmot, 503  
 Willmott v. Flewitt, 514, 517  
 Wilson, *In bonis*, 23, 29, 30, 59  
 Wilson's Trusts, *In re*, 227  
 Wilson, *In re*; Menteith v. Campbell,  
   16, 17  
   — Ashburner v., 219  
   — v. Atkinson, 279  
   — v. Bayly, 510, 529  
   — v. Beddard, 23  
   — v. Bennett, 75  
   — Bentham v., 258  
   — v. Brownsmith, 104  
   — v. Chesnut, 546  
   — v. Coles, 198  
   — Creagh v., 455  
   — Earle v., 237  
   — v. Eden, 166  
   — Ferrand v., 439, 645  
   — Hallifax v., 523, 524  
   — v. Ivat, 616  
   — Kehoe v., 293  
   — v. Maddison, 139, 314, 393  
   — v. Major, 380  
   — v. Morley, 149  
   — v. Mount, 419, 421  
   — Newman v., 131  
   — Nicholson v., 285  
   — v. O'Leary (12 Eq. 522; 7 Ch.  
     448), 115, 117  
   — v. O'Leary (17 Eq. 419), 620  
   — Petty v., 147  
   — v. Piggott, 600  
   — Porcher v., 131  
   — R. v., 356  
   — Shore v., 95  
   — Sleeman v., 79  
   — Smith v., 95  
   — Spencer v., 196, 413  
   — v. Squire, 297  
   — Straker v., 644  
   — Thornber v. (3 Dr. 245), 296  
   — Thornber v. (4 Dr. 350), 302  
   — Townsend v., 357  
   — v. Townshend, Lord, 83  
   — v. Vansittart, 317  
   — Wells v., 56  
   — Williams v., 142  
   — v. Wilson, 437, 444  
 Wilton's Estate, 278  
 Wilton, Michell v., 637

- Wiltshire, A.-G. v., 186  
   — Bentham v., 360  
 Winbolt, Grant v., 393  
 Winch v. Brutton, 379  
 Winchelsea, Lord, A.-G. v., 619  
   — Todd v., 29  
   — v. Wauchope, 29  
 Winckworth v. Winckworth, 378  
 Winder, Cort v., 520  
 Windham v. Graham, 224  
   — Townshend v., 215  
 Windle, Batteley v., 614  
 Windross, Matthews v., 326  
   — Middleton v., 83  
 Windsor, Dean of, A.-G. v., 300  
 Windus v. Windus, 152  
 Wing v. Angrave, 480  
   — Small v., 635  
   — Underwood v., 603  
   — Wickham v., 463  
   — v. Wing, 285, 370  
 Wingfield v. Newton, 189  
   — v. Wingfield, 274, 331, 492, 495  
 Winn v. Fenwick, 251, 421  
   — v. Littleton, 208  
   — Varley v., 486  
 Winnall, Rudge v., 151, 414  
 Winshup, Abrams v., 326  
 Winson v. Pratt, 39, 44  
 Winter, Bronsdon v., 104  
   — Mackell v., 573  
   — v. Perratt, 270  
   — r. Winter, 605  
 Winterton v. Crawford, 505  
 Wintour v. Clifton, 87  
 Winingham, Loscombe v., 290, 297, 299  
 Wirley, Hills v., 604  
 Wisden v. Wisden (5 Jur. N. S. 455), 132  
   — v. Wisden (2 Sm. & G. 396), 328, 604  
 Wise v. Piper, 561  
 Witham v. Witham, 486  
 Withers, Allgood v., 330  
   — v. Kennedy, 633  
   — King v., 407  
   — Wheables v., 487  
 Withy v. Mangles, 275  
 Wolfe Murray, Dundas v., 141  
 Wolferstan, Jervis v., 602  
 Wollaston's Settlement, 422  
 Wollaston v. King, 82, 440  
   — r. Wollaston, 387  
 Wollen v. Andrews, 442  
 Wolstenholme, *Re*; Marshall v. Aizlewood, 459  
   — Tittley v., 75  
 Wolverton Mortgaged Estates, *In re*, 209  
 Wombwell v. Hanrott, 600  
 Wonstanley, King v., 804  
 Wood, *In re*, 79  
 Wood's Estate, *In re*, 648  
   — Will, *In re*, 619  
   — Will, *Re Mary*, 191  
 Wood, *In re*; Moore v. Bailey, 499  
   — Ashton v., 75  
   — Aston v. (22 W. R. 893; 43 L. J. Ch. 715), 82, 121, 188  
   — Aston v. (6 Eq. 419), 296, 378, 383  
   — Barber v., 100, 620  
   — v. Baron, 333  
   — Bird v., 279  
   — Brown v., 275  
   — v. Cox, 383  
   — Culbertson v., 367  
   — Draycott v., 394, 409  
   — v. Drew, 431  
   — Gaynon v., 594  
   — Gloucester, Corporation of, v., 296, 378, 383  
   — v. Goodlake, 53  
   — Haydon v., 360  
   — Holford v., 114, 618  
   — Holland v., 246, 500  
   — Hutchings v., 60  
   — Jopp v. (34 B. 88; 13 W. R. 481), 3  
   — Jopp v. (28 B. 53; 2 D. J. & S. 323), 521  
   — L'Huille v., 53  
   — v. Medley, 53  
   — Meeds v., 399, 406  
   — Milne v., 228  
   — Oakley v., 320  
   — v. Ordish, 620  
   — v. Penoyre, 138  
   — Robinson v., 478  
   — Seaman v., 438  
   — Seley v., 615  
   — Solley v., 635  
   — Waters v., 102  
   — Watt v., 446  
   — v. White, 359  
   — v. Wood (1 P. & D. 309), 54, 58  
   — v. Wood (4 Eq. 48), 224  
   — v. Wood (3 Ha. 65), 266  
   — v. Wood (35 B. 587), 488  
   — v. Wood (7 B. 183), 593  
   — Wordsworth v., 509  
 Woodall, Doe d. Woodall v., 341  
 Woodburne v. Woodburne, 488, 489, 520  
 Woodcock v. Dorset, Duke of, 421  
   — Kearsley v., 460, 463  
   — v. Renneck, 423  
 Woollen v. Osbourn, 100

- Woodford, Oddie r., 271  
 Woodgate r. Unwin, 320  
 Woodhouse, Doe r., 347  
     — r. Herrick, 343  
     — r. Meredith, 167  
 Woodhouselee, Lord, r. Dalrymple, 228  
 Woodley, Montgomerie r., 402  
 Woodmeston r. Walker, 389, 470  
 Woodroffe, Widmore r., 295, 310  
 Woods r. Woods, 267  
 Woodside, Millar r., 102  
 Woodward, *In bonis*, 46  
     — r. Glasbrook, 531  
 Woolcomb r. Woolcomb, 184  
 Woolcott, Cripps r., 508, 509  
 Woolst, Cooper r., 151  
 Woolley, Hall r., 495  
     — r. Jenkins, 359  
 Woolmore r. Burroughes, 560  
     — r. Burrows, 266, 558  
 Woolrich, *In re*; Harris r. Harris, 497  
 Woolridge, Brunsden r., 295  
     — r. Woolridge, 85  
 Wools, Webb r., 385  
 Woolstencroft r. Woolstencroft, 131  
 Wordsworth r. Wood, 509  
 Worlidge r. Churchill, 613, 517  
 Wormald, Curteis r., 199  
 Wormaley's Estate, *In re*; Hill r. Wormsley, 129  
 Worrall, Down r., 298  
 Worsfold, Parrott r., 108  
 Worthington, *In bonis*, 35  
     — r. Evans, 457  
     — Gude r., 386  
     — Ingleman r., 636  
 Worts v. Cubitt, 232  
 Wotton, *In bonis*, 25, 32  
     — Brydges r., 288  
 Wraith, Minter r., 281  
 Wrangham's Trusts, 417  
 Wray, *In bonis*, 21  
     — v. Field, 115  
     — Gillett r., 455  
 Wreford, Knapman r., 123  
 Wren r. Bradley, 400  
 Wrench r. Jutting, 185, 188  
 Wrey r. Smith, 201  
 Wright, *In bonis*, 25  
 Wright's Trusts, *In re*, 227  
 Wright, Archibald r., 74, 376  
     — v. Atkins, 266, 380  
     — Bromley r., 153, 555  
     — v. Callender, 390, 636  
     — Groves r., 472  
     — Jesson v., 336, 337, 338, 341  
     — r. Lambert, 647  
     — Maynard r., 581  
 Wright r. Netherwood, 57  
     — Olivant r., 325, 487  
     — r. Pearson, 337  
     — Reynold r., 613  
     — Shallcross v., 187  
     — r. Shelton, 160  
     — r. Stephens, 485  
     — r. Tuckett, 643  
     — Turner v., 645  
     — Vernon r., 271  
     — r. Wakeford, 24  
     — r. Warren, 125, 136  
     — r. Weston, 113  
     — r. Wilkin, 398  
     — v. Wright (16 Ves. 188), 198  
     — r. Wright (1 Ves. sen. 409), 331  
     — r. Wright (12 Ir. Ch. 401), 393  
     — r. Wright (2 J. & H. 647), 470  
 Wrighte, Doe d. Burdette r., 313, 326  
 Wrightson r. Calvert, 243  
     — r. Macaulay, 270  
 Wrigley r. Sykes, 362, 632  
 Wroughton r. Colquhoun, 390, 636  
 Wyatt, Cooper r., 464  
     — Evans r., 133  
     — Ingram r., 20  
 Wybrants, Foster r., 261, 374  
 Wych r. Packington, 383  
 Wyld r. Lewis, 563  
 Wyld's Estate, 218  
 Wylie v. Enohin, 3, 183  
 Wyman r. Carter, 349  
 Wynch, *Ex parte*, 371, 374  
     — r. Wynch, 140, 414  
 Wyndham's Trusts, *In re*, 283, 540  
 Wyndham v. Fane, 223  
     — v. Wyndham, 246  
 Wynford, Lord, Falkner r., 251  
 Wynne, Clough r., 375  
     — v. Fletcher, 458  
 Wythe v. Henniker, 627, 628
- YALDEN, *Re*, 460  
 Yapp, Gladding r., 615  
 Yardley r. Holland, 123  
     — Paramour r., 578  
     — v. Yardley, 555  
 Yarnold r. Moorhouse, 465  
 Yarrow r. Knightly, 321, 327, 328  
     — London, University of, r., 307  
 Yates' Trust, *Re*, 522  
 Yates, Buggins r., 379  
     — v. Compton, 355, 383  
     — r. London, University of, 450  
     — r. Maden, 391  
     — v. Yates (6 Jur. N. S. 1023), 193  
     — v. Yates (28 B. 637), 200



- Yeap Cheah Neo v. Ong Ching Neo, 267, 291, 294  
 Yearwood's Trusts, *In re*, 232  
 Yeates, Choat v., 618  
 Yeatherd, Patrick v., 183  
 Yeats v. Yeats, 242  
 Yelverton, Bubbs v., 288  
     — v. Yelverton, 5  
 Yockney v. Hansard, 114  
 Yonge v. Furze, 455  
 York, Birdsall v., 254  
     — Sheath v., 57  
 Youle, Roberts v., 526  
 Young's Settlement, *Re*, 461  
 Young, Barker v., 530  
     — Burdett v., 579  
     — Chatteris v. (2 Russ. 184), 118  
     — Chatteris v. (Beames on Costs, 390), 626  
     — Cloyne, Bishop of, v., 615  
 Young v. Davies, 606  
     — v. Furze, 126  
     — v. Grove, 313, 398  
     — Hubbard v., 201  
     — v. Macintosh, 559  
     — v. Martin, 381  
     — Meacher v., 368  
     — Page v., 105, 189  
     — v. Robertson, 407, 515, 516, 519  
     — v. Turner, 533  
     — v. Young, 638  
 Younghusband v. Gisborne, 462  
 ZICHY FERRARIS, Countess of, v. Hertford, Marquis of, 64  
 Zouch v. Lambert, 615



# A CONCISE TREATISE ON WILLS.

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## CHAPTER I.

### BY WHAT LOCAL LAW WILLS ARE REGULATED.

A WILL, so far as it relates to immovable property, must <sup>Will of</sup> be made in accordance with the formalities required by <sup>immov-</sup> the law of the land where the immovable property is <sup>ables.</sup> situated.

Immovable property for this purpose includes leaseholds; <sup>Lease-</sup> the validity and construction, therefore, of wills so far as <sup>holds.</sup> they affect leaseholds in England, must be governed by English law. *Freke v. Lord Carbery*, 16 Eq. 461; *In bonis Gentili*, 1 R. 9 Eq. 541.

Wills of personalty made in execution of powers are <sup>Will under</sup> valid, if made in accordance with the instrument creating <sup>power.</sup> the power without reference to the domicile of the testator. *Tatnall v. Hankey*, 2 Moo. P. C. 342; *In bonis Alexander*, 6 Jur. N. S. 354; 29 L. J. P. 93; 1 Sw. & T. 454, n.; *In bonis Hallyburton*, 1 P. & D. 90.

A power to appoint personalty by will, given by an instrument executed in England, may be exercised by any valid will, whether executed in accordance with the Wills Act or not. *D'Huart v. Harkness*, 34 L. J. Ch. 311; 11 Jur. N. S. 633; 34 B. 324.

By 24 & 25 Vict. c. 114, which extends only to testa-

mentary instruments made by persons dying after the 6th August 1861, it is enacted—

Wills made out of the kingdom to be admitted if made according to the law of the place where made.

1. Every will and other testamentary instrument made out of the United Kingdom by a British subject (whatever may be the domicile of such person at the time of making the same, or at the time of his or her death) shall, as regards personal estate, be held to be well executed for the purpose of being admitted in England and Ireland to probate, and in Scotland to confirmation, if the same be made according to the forms required either by the law of the place where the same was made, or by the law of the place where such person was domiciled when the same was made, or by the laws then in force in that part of Her Majesty's dominions where he had his domicile of origin. See *In bonis De la Saussage*, 3 P. & D. 42; *In bonis Donaldson*, 3 P. & D. 45; *In bonis Lacroix*, 2 P. D. 94; *In bonis Gatti*, 27 W. R. 323.

Wills made in the kingdom to be admitted if made according to local usage.

2. Every will and other testamentary instrument made within the United Kingdom by a British subject (whatever may be the domicile of such person at the time of making the same, or at the time of his or her death) shall, as regards personal estate, be held to be well executed, and shall be admitted in England and Ireland to probate, and in Scotland to confirmation, if the same be executed according to the forms required by the laws for the time being in force in that part of the United Kingdom where the same is made. See *In bonis Gally*, 1 P. D. 438.

Change of domicile not to invalidate will.

3. No will or other testamentary instrument shall be held to be revoked or to have become invalid, nor shall the construction thereof be altered, by reason of any subsequent change of domicile of the person making the same.

It is doubtful whether the will of a British subject made in Scotland, where a will is not revoked by marriage, would be revoked by the subsequent acquisition of an English

domicile and the marriage of the testator. *In bonis Reid*, 1 P. & D. 74.

The validity of wills of personal property, except in the case <sup>Domicile.</sup> of British subjects dying after August 1861, is governed by the law of the testator's domicile at the date of the death. *Anstruther v. Chalmers*, 2 Sim. 1; *Stanley v. Bernes*, 3 Hagg. 373; *Price v. Dewhurst*, 8 Sim. 279; 4 M. & Cr. 76; *Preston v. Melvill*, 8 Cl. & F. 1; *Craigie v. Lewin*, 3 Curt. 435; *De Zichy Ferraris v. Lord Hertford*, 3 Curt. 468; *Bremmer v. Freeman*, 10 Moo. P. C. 306; *Enohin v. Wylie*, 10 H. L. 1; see *Eames v. Hacon*, 16 Ch. D. 407.

Legislative changes in the law of the country, where the deceased was domiciled, made after his death, though with express reference to his will, cannot be considered in deciding upon the right to have the will proved in this country. *Lynch v. Provisional Government of Paraguay*, 2 P. & D. 268.

The administration of the personal property of a deceased <sup>Domicile governs administration and construction of will.</sup> person, whether a British subject or not, including the construction of his will, is governed by the law of the testator's domicile at the time of his death. *Enohin v. Wylie*, 10 W. R. 467; 10 H. L. 1.

In matters of procedure, such as payment of interest on legacies, the Court follows its own practice. *Hamilton v. Dallas*, 38 L. T. N. S. 215.

The question of domicile is independent of naturalisation <sup>Domicile independent of allegiance.</sup> and allegiance. *Udny v. Udny*, L. R. 1 H. L. Sc. 441; *Haldane v. Eckford*, 8 Eq. 631; *Brunel v. Brunel*, 12 Eq. 299; *Douglas v. Douglas*, 12 Eq. 617. The following cases on this point are overruled:—*Moorhouse v. Lord*, 10 H. L. 272; *In re Capdevielle*, 2 H. & C. 985; *A.-G. v. Countess de Wahlenstätt*, 3 H. & C. 374; *Jopp v. Wood*, 34 B. 88; 13 W. R. 481; *Maltass v. Maltass*, 1 Rob. 67.

According to English law every person has a domicile. If a domicile of choice has not been acquired, the law

attributes to him a domicile, which may be called his domicile of origin.

Domicile  
of origin of  
children.

The domicile of origin of a legitimate child is that of its father, of an illegitimate child that of its mother. *Dalhousie v. Macdougall*, 7 Cl. & F. 817; *Munro v. Munro*, 7 Cl. & F. 842; *Re Patten*, 6 Jur. N. S. 151.

After the death of their father the domicile of infant children is the domicile of the mother as long as she remains a widow. *Pottinger v. Wightman*, 3 Mer. 67; see *Johnston v. Beattie*, 10 Cl. & F. 42, 66.

It is unsettled whether the capacity of the widow to alter the domicile of her infant children is not lost on her second marriage. See *Dicey on Dom.*, 102, citing *Ryall v. Kennedy*, 40 N. Y. Sup. Ct. 347, where it was held that upon remarriage of the widow the domicile which infants had immediately before the mother's remarriage remained.

Of lunatic.

The domicile of a person, who is a lunatic when he attains his majority and so remains up to the time of his death, changes with that of his father in the case of a legitimate child and with that of his mother in the case of an illegitimate child, when there is no committee of the person. *Sharpe v. Crispin*, 1 P. & D. 611.

It is doubtful whether a guardian can change an infant's domicile. *Douglas v. Douglas*, 12 Eq. 617, 625.

Of married  
woman.

The domicile of a married woman at any given time is the domicile of her husband at that time. *Warrender v. Warrender*, 2 Cl. & F. 488; *Dalhousie v. Macdougall*, 7 Cl. & F. 817; *Whitcomb v. Whitcomb*, 2 Curt. 351; *Dolphin v. Robins*, 7 H. L. 390; *Bell v. Kennedy*, L. R. 1 H. L. Sc. 307.

A married woman living apart from her husband under an agreement for a separation has no power to change her domicile by her own act. *Warrender v. Warrender*, 2 Cl. & F. 488. *In re Daly's Settlement*, 25 B. 456.

After a decree for a divorce the wife can select her own domicile. *Williams v. Dormer*, 2 Rob. 505.

It would seem that the same rule should apply after a judicial separation. See *Dolphin v. Robins*, 7 H. L., pp. 416, 420; *Le Sueur v. Le Sueur*, 1 P. D. 139; 2 P. D. 79.

Persons entering the military service of any state acquire the domicile of that state. *President of United States v. Drummond*, 12 W. R. 701; 33 B. 449. Military service.

But the domicile of a person domiciled within the United Kingdom, for instance in Jersey, is not changed by entering the military service of the Crown. *Re Patten*, 6 Jur. N. S. 151; *Brown v. Smith*, 15 B. 444; *Yelverton v. Yelverton*, 29 L. J. P. 34; 1 Sw. & T. 574.

Entry into the service of the East India Company formerly effected a change of domicile. *Bruce v. Bruce*, 2 B. & P. 229, n.; 6 B. P. C. 566; *Munroe v. Douglas*, 5 Mad. 379; *Forbes v. Forbes*, Kay 341; *Craigie v. Lewin*, 3 Curt. 435. East India Company's service.

The domicile of origin endures until an actual change is made by which another domicile is acquired. *Bell v. Kennedy*, L. R. 1 H. L. Sc. 307; *Ommaney v. Bingham*, cit. 5 Ves. 757; *Somerville v. Lord Somerville*, 5 Ves. 749, 786; *Moore v. Budd*, 4 Hag. 346; *Munro v. Munro*, 7 Cl. & F. 842, 876; *Countess of Dalhousie v. Macdougall*, 7 Cl. & F. 817; *A.-G. v. Dunn*, 6 M. & W. 511; *De Bonneval v. De Bonneval*, 1 Curt. 856.

A domicile of choice is acquired by a person who fixes his sole or principal residence in a country which is not his country of origin with the intention of residing there for a period not limited as to time. *King v. Foxwell*, 3 Ch. D. 518; *Drevon v. Drevon*, 12 W. R. 946; *The Harmony*, 2 Rob. Ad. 322; *Bempde v. Johnstone*, 3 Ves. 198. Domicile of choice.

A person may by the duties of his position or by his profession be disqualified from acquiring a domicile of choice. Disability to acquire domicile of choice.

Thus it seems that an officer holding a commission from the Crown cannot acquire a new domicile unless he is on

half-pay. *Craigie v. Lewin*, 3 Curt. 435; *Hodgson v. De Beauclerc*, 12 Moo. P. C. 285; *Cockrell v. Cockrell*, 25 L. J. Ch. 730.

Ambassa-  
dor or  
peer.

But there is nothing in the position of an ambassador or peer of the realm to prevent the acquisition of a domicile of choice. *Heath v. Samson*, 14 B. 441; *A.-G. v. Kent*, 1 H. & C. 12; *Hamilton v. Dallas*, 1 Ch. D. 257.

Compul-  
sory resi-  
dence.

A domicile of choice can only be acquired by choice, therefore a compulsory residence abroad as a refugee, or to avoid creditors, will not effect a change of domicile, unless followed by voluntary adoption of the new domicile. *De Bonneval v. De Bonneval*, 1 Curt. 864; *Pitt v. Pitt*, 12 W. R. 1089.

Similarly residence abroad in the performance of a public duty, such as that of judge, military officer or consul, does not in itself confer a foreign domicile. *A.-G. v. Rowe*, 1 H. & C. 31; *A.-G. v. Napier*, 6 Ex. 217; *Sharpe v. Crispin*, 1 P. & D. 611.

Residence  
for sake of  
health.

A person compelled to go abroad for the sake of his health would probably not acquire a foreign domicile. See *Johnston v. Beattie*, 10 Cl. & F. 42, p. 138.

But where a foreign country is selected as a residence in the hope or opinion that it may be better suited to the health or constitution, a domicile of choice may be acquired. *Hoskins v. Matthews*, 8 D. M. & G. 13.

Domicile  
of choice  
con-  
sti-  
tuted by  
completed  
intention.

Domicile of choice is a mixed question of intention and fact; there must be an intention to reside permanently in a particular country, followed by actual residence. Where the intention is clear, length of residence would be immaterial.

Where there is no direct evidence of intention, length of residence is material as showing what the intention was.

Thus a fixed intention to adopt a certain place as a domicile, followed by arrival at that place, would, it seems,



at once constitute that place a domicile. *Bell v. Kennedy*, L. R. 1 H. L. Sc. 307.

The fact of residence in a particular place will not constitute that place a domicile of choice so long as the person residing is in search of some permanent place of residence, and has not made up his mind where it shall be. *Bell v. Kennedy*, L. R. 1 H. L. Sc. 307; *Whicker v. Hume*, 7 H. L. 124. *Quærens quo se conferat.*

By permanent residence must be understood residence to which no definite limit of time can be assigned. Permanent residence.

Thus residence abroad with a view to making a fortune will effect a change of domicile. *Lyall v. Paton*, 25 L. J. Ch. 746; *Allardice v. Onslow*, 33 L. J. Ch. 434.

So an intention to reside in a country as long as another person lives is in effect an intention to reside permanently. *Anderson v. Laneuville*, 9 Moo. P. C. 325.

Where a person has in fact taken up a permanent residence in a country, that country will be his domicile notwithstanding an intention to retain his domicile of origin, or some other domicile. *A.-G. v. Kent*, 1 H. & C. 12; *A.-G. v. Fitzgerald*, 3 Dr. 610; *In re Steer*, 3 H. & N. 594; *Doucet v. Geoghegan*, 26 W. R. 825; 9 Ch. D. 441. See, too, *Stanley v. Bernes*, 3 Hag. 373; *Anderson v. Laneuville*, 9 Moo. P. C. 325; *In bonis Raffanel*, 3 Sw. & T. 49; *Stevenson v. Masson*, 17 Eq. 78. Intention to return.

Where a person has two residences, the place where he usually resides with his wife and family will be considered his place of domicile. *Forbes v. Forbes*, Kay, 341; *Aitchison v. Dixon*, 10 Eq. 589; *Platt v. A.-G. of New South Wales*, 3 App. C. 336. Two residences.

Where a domicile of choice is abandoned, the domicile of origin is revived until a fresh domicile of choice is acquired. *The Indian Chief*, 3 Rob. Adm. 12; *In bonis Bianchi*, 3 Sw. & T. 16; *Udny v. Udny*, L. R. 1 H. L. Sc. Revival of domicile of origin.

441; *King v. Foxwell*, 3 Ch. D. 518; overruling *Munroe v. Douglas*, 5 Mad. 379, 405, so far as inconsistent.

By 24 & 25 Vict. c. 121, where a convention has been entered into with a foreign state willing to adopt the provisions of the Act, an order in Council may direct that no British subject resident in such state shall acquire a domicile there unless he shall have been resident there for a year, and shall have made a declaration of his intention to become domiciled there; and the subjects of the foreign state are to acquire a British domicile only after the same formalities have been gone through.

## CHAPTER II.

### GENERAL CHARACTERISTICS OF TESTAMENTARY INSTRUMENTS.

A GIFT intended to be testamentary can only be effectually made by an instrument duly executed as a will. Thus, a direction to give property to a person after the donor's death, where the donor retains full control of the property in his life, is invalid. *Powell v. Hellicar*, 26 B. 261; *Fletcher v. Fletcher*, 4 Ha. 79; *Hughes v. Stubbs*, 1 Ha. 481; *Maguire v. Dodd*, 9 Ir. Ch. 452; *Farquharson v. Cave*, 2 Coll. 356; *Gough v. Findon*, 7 Ex. 48. Testamentary gift.

In the same way a deed not intended to have any effect till the settlor's death is testamentary. *Consett v. Bell*, 1 Y. & C. C. 569; *Rigden v. Vallier*, 2 Ves. Sen. 253; *Dillon v. Coppin*, 4 M. & Cr. 647; *In bonis Morgan*, 1 P. & D. 214; *Fielding v. Walshaw*, 27 W. R. 492. Deed to take effect after death.

A voluntary settlement, though reserving to the settlor a life interest and containing a power of revocation, is not testamentary. *Thompson v. Browne*, 3 M. & K. 32. The case of *A.-G. v. Jones*, 3 Pr. 368, is overruled; see *Majoribanks v. Hovenden*, 1 Dru. 11, 27, 29; *Sheldon v. Sheldon*, 1 Rob. 83; *Brown v. Adv.-G.*, 1 Macq. 79; see too *Hope v. Harman*, 11 Jur. 1097; *Hope v. Hope*, 10 B. 581. Voluntary settlement.

Similarly, an instrument coming into operation immediately, and of which no part is revocable, more especially if it involves anything in the nature of consideration, cannot take effect as a will. *In bonis Robinson*, 1 P. & D. 384;

see *In bonis Halpin*, 1 R. 8 Eq. 567; *Thorncroft v. Lashmar*, 10 W. R. 783.

Deed in  
part testa-  
mentary.

On the other hand, if a deed is in part clearly testamentary, such part may take effect as a will, though other parts are not testamentary. *Doe d. Cross v. Cross*, 8 Q. B. 714; see *Peacocke v. Monk*, 1 Ves. 127; Belt 82; *Hogg v. Lashley*, 3 Hagg. 415, note; *Bagnall v. Downing*, 2 Lee 3.

What may  
take effect  
as a will.

Any instrument executed in the manner required by the Wills Act may take effect as a will, provided the intention was that it should not operate till after the death of the donor.

Thus, the following instruments being properly executed, have been allowed to take effect as testamentary dispositions :—

Orders on a savings bank, and on a banker. *In bonis Marsden*, 1 Sw. & T. 542; *Jones v. Nicolay*, 2 Rob. 288.

A cheque to take effect after death. *Bartholomew v. Henley*, 3 Phillim. 317.

A letter. *Denny v. Barton*, 2 Phillim. 575; *In bonis Mundy*, 2 Sw. & T. 119; 9 W. R. 171.

A paper containing wishes and a dying request. *In bonis Lowry*, 5 N. of C. 619; *In bonis Mundy*, 2 Sw. & T. 119.

A deed of gift to take effect at death. *Habergham v. Vincent*, 2 Ves. J. 204; 4 B. C. C. 355; *Thorold v. Thorold*, 1 Phillim. 1; *Shergold v. Shergold*, cit. *ib.* 10; *In bonis Montgomery*, 5 N. of C. 99; *In bonis Morgan*, 1 P. & D. 214; *Fielding v. Walshaw*, 27 W. R. 492.

An instrument to take effect two years "after my wife's death if she survives me." *In bonis News*, 7 Jur. N. S. 688.

Where there is nothing to show that an instrument has reference to the death of the person executing it, it cannot have effect as a will. *Glynn v. Oglander*, 2 Hagg. 428; *King's Proctor v. Daines*, 3 Hagg. 218; *Shingler v.*

*Pemberton*, 4 Hagg. 359; *Majoribanks v. Hovenden*, 1 Dru. 11.

But evidence is admissible to show that a deed or other instrument of gift, which on the face of it is not testamentary, was not intended to operate till the death of the person executing it. *Cock v. Cooke*, 1 P. & D. 241; *Robertson v. Smith*, 2 P. & D. 43; *In bonis Coles*, 2 P. & D. 362; *In bonis Webb*, 3 Sw. & T. 482; 10 Jur. N. S. 709; *In bonis English*, 3 Sw. & T. 586.

And, conversely, evidence is admissible to show that an instrument on the face of it testamentary was not intended to be a will. *Nicholls v. N.*, 2 Phillim. 180; *Lister v. Smith*, 3 Sw. & T. 282; *Trevelyan v. T.*, 1 Phillim. 149; *In bonis Nosworthy*, 11 Jur. N. S. 570.

An instrument, expressing merely an intention of instructing a solicitor to prepare a testamentary instrument with a view to make a particular legacy, will not take effect as a testamentary instrument, where there is no extraneous evidence of testamentary intention. *Coventry v. Williams*, 3 Curt. 787.

A duly executed instrument described as instructions for a will may have effect as a will if it appears that it was intended to take effect in the absence of a more formal instrument. *Bone v. Spear*, 1 Phillim. 345; *Torre v. Castle*, 1 Curt. 303; 2 Moore P. C. 133; *Barwick v. Mullings*, 2 Hagg. 225; *Hattatt v. Hattatt*, 4 Hagg. 211.

A will may be made contingent upon the happening of an event, so that if the event does not happen the will has no effect. *Roberts v. Roberts*, 2 Sw. & T. 337; 31 L. J. P. 46.

Thus, if the testator makes his will conditional upon his death during a particular period which he survives, the will does not take effect. *In bonis Porter*, 2 P. & D. 22; *In bonis Robinson*, 2 P. & D. 171; *In bonis Lindsay*, 2

P. & D. 459. See *In bonis Thorne*, 4 Sw. & T. 36; 34 L. J. P. 131.

On the other hand, if the possibility of death during a particular period is given as the reason or motive why the testator makes his will, it is not contingent upon the happening of the death during that period. *In bonis Dobson*, 1 P. & D. 88; *In bonis Martin*, 1 P. & D. 380; *In bonis Mayd*, 29 W. R. 214.

A testator may give to a third person the option of deciding whether a testamentary instrument executed by him shall take effect as a will or not. *In bonis Smith*, 1 P. & D. 717.

Will re-  
vocable.

A will is in all cases revocable, even though the testator may declare it to be irrevocable. *Vynior's Case*, 8 Co. 82a.

Joint wills.

Persons may make joint wills, which are, however, revocable at any time by either of them or by the survivor. *Hobson v. Blackburn*, 1 Add. 274; *In bonis Stracey*, Dea. & S. 6; *In bonis Lovegrove*, 2 Sw. & T. 453.

A joint will may be made to take effect after the death of both testators; and if the joint will is not a disposition by each testator of his own property, but a disposition of joint property after the death of the survivor, the will cannot be proved till the death of the survivor. *In bonis Raine*, 1 Sw. & T. 144.

In ordinary cases a joint will is looked upon as the will of each testator, and may be proved on the death of one. *In bonis Stracey*, 1 Jur. N. S. 1197; Dea. & S. 6; *In bonis Miskelly*, 1 R. 4 Eq. 62, where *In bonis Raine* is disapproved.

Mutual  
wills.

It seems that two persons may agree to make mutual wills, which remain revocable during the joint lives by either with notice to the other, but become irrevocable after the death of one of them if the survivor takes advan-

tage of the provisions made by the other. *Dufour v. Pereira*, 1 Dick. 419; 2 Harg. Jur. Arg. 272; 2 Harg. Jur. Ex. 101; see 3 Ves. 416; *Lord Walpole v. Lord Orford*, 3 Ves. 401; *Denyssen v. Mostert*, L. R. 4 P. C. 236; *Dias v. De Lieveru*, 5 App. C. 123, P. C.

## CHAPTER III.

## TESTAMENTARY CAPACITY.

## General capacity.

A TESTATOR must, at the time of making his will, have an understanding of the nature of the business in which he is engaged, a recollection of the property he means to dispose of, of the persons who have a claim to be the objects of his bounty, and the manner in which it is to be distributed. *Harwood v. Baker*, 3 Moo. P. C. 282; *Longford v. Purdon*, 1 L. R. Ir. 75.

The question of sanity is a question of fact and there is no presumption, that a testator is sane till the contrary is shown. *Sutton v. Sadler*, 5 W. R. 880; 3 C. B. N. S. 87; *Symes v. Green*, 1 Sw. & T. 401; *Cleare v. Cleare*, 1 P. & D. 655.

## Delusions.

Where a testator is subject to delusions with regard to persons who would be the natural objects of his testamentary bounty, his will made while he is under the influence of such delusions is invalid. *Dew v. Clark*, 3 Add. 79; 5 Russ. 163; *Waring v. Waring*, 6 Moo. P. C. 341; *Smith v. Tebbitt*, 1 P. & D. 398; *Boughton v. Knight*, 3 P. & D. 64.

Where a testator is subject to delusions, which leave the general power of understanding unaffected and are wholly unconnected with his testamentary dispositions, such delusions do not affect his capacity to make a will. *Banks v. Goodfellow*, L. R. 5 Q. B. 549; *Smee v. Smee*, 5 P. D. 84; see *Jenkins v. Morris*, 14 Ch. D. 674.

A will made by a testator after he has been insane



must be shown to have been made after his recovery or in a lucid interval. *Groom v. Thomas*, 2 Hagg. 433; *A.-G. v. Parnter*, 3 B. C. C. 443; *Hall v. Warren*, 9 Ves. 611; *Waring v. Waring*, 6 Moo. P. C. 341.

Upon the question whether a will was made during a <sup>Lucid interval.</sup> lucid interval, the rational character of the will, where it is prepared by the testator without assistance, is evidence to show that it was made in a lucid interval. *Cartwright v. Cartwright*, 1 Phillim. 90, 100; *White v. Driver*, 1 Phillim. 88; *Brogden v. Brown*, 2 Add. 445; *Ayrey v. Hill*, 2 Add. 210.

Every person of sound mind and not under some special disability may make a will.

A will made by a person under the age of twenty-one <sup>Infants.</sup> (unless he is a soldier in actual military service, or a mariner or seaman at sea) is invalid. 1 Vict. c. 26, s. 7; Sugd. R. P. Stat. 330.

Except in the following cases a married woman has no <sup>Married women.</sup> power to make a will:

A married woman, who is an executrix, may make a will and appoint an executor for the purpose of continuing the representation to the original testator. *Scammell v. Wilkinson*, 2 East 552; *Birkett v. Vandercom*, 3 Hag. 750; *In bonis Richards*, 1 P. & D. 156.

A married woman may dispose by will of the legal estate and the equitable interest in lands and of personal estate in exercise of a power. *Driver v. Thompson*, 4 Taunt. 294; *Willock v. Noble*, L. R. 7 H. L. 580.

A will made by a woman during coverture in exercise of a power given to her by the settlement made on her first marriage, may be exercised during that or any subsequent coverture. *Burnet v. Mann*, 1 Ves. Sen. 156; *Hawksley v. Barrow*, 1 P. & D. 147.

In the case of realty, where a married woman having <sup>Whether power destroyed</sup> appointed by will under a power survives her husband and

by conveyance.

takes a conveyance to herself, the conveyance has been held to execute the power and to revoke the will. *Lawrence v. Wallis*, 2 B. C. C. 319—the decision may have been influenced by the old doctrine, that a will of lands is revoked by an alteration of the estate of the testator in the lands, but the judgment does not refer to this doctrine.

In the case of personalty, however, it has been held that where a married woman having made a will under a power survives her husband and takes an assignment of the fund over which the power extends from the trustees, the will is nevertheless valid. *Dingwell v. Askeu*, 1 Cox. 427; *Clough v. Clough*, 3 M. & K. 296. These cases are probably open to reconsideration.

3. Will of separate estate.

A married woman can dispose by will of personal estate and of the beneficial interest in real estate when settled to her separate use. *Taylor v. Meads*, 10 Jur. N. S. 166; 34 L. J. Ch. 203; 4 D. J. & S. 597; *Pride v. Bubb*, 7 Ch. 64; *Hall v. Waterhouse*, 10 Jur. N. S. 361; 5 Giff. 64.

The legal estate not being affected by the separate use cannot be disposed of by will.

Savings.

The accumulations of property belonging to a married woman for her separate use, made during coverture whether by herself or a trustee for her, are separate estate; accumulations made after the husband's death are not separate estate, and will, therefore, not pass by a will made during coverture. *In re Wilson*; *Menteith v. Campbell*, 26 W. R. 848. *In bonis Tharp*, 3 P. D. 76.

Separate use to arise on contingency.

In an Irish case it has been said, that a married woman has no power of disposition over property given to her for her separate use, where the separate use is only to arise in certain events. See *Bestall v. Bunbury*, 13 Ir. Ch. 318, following *Mara v. Manning*, 8 Ir. Eq. 218. Both these cases were, however, cases of contract and not of wills. See too, *Flower v. Buller*, 15 Ch. D. 665.

Where a married woman has a power to appoint if she should not survive her husband, and an absolute interest to her separate use if she survives him, a will made during coverture, expressed to be in virtue of the power and of every other power enabling her, will take effect upon the separate estate if she survives her husband. *Bishop v. Wall*, 3 Ch. D. 194.

A married woman may, with her husband's assent, 4. Will dispose by will of personal property not settled to her separate use and over which she has no power of appointment. *Willock v. Noble*, L. R. 8 Ch. 778; 7 H. L. 580.

The assent of the husband must be given to the particular will with knowledge of its contents.

It is said in *Noble v. Willock*, 8 Ch., p. 790, that the husband may withdraw his assent until he has either assented to probate or has in some manner acted upon the will.

However, in *Maas v. Sheffield*, 1 Rob. 364, it was held that a husband having given his assent in writing to his wife's will after her death, but before probate, could not revoke it. The case is probably open to reconsideration; see *In bonis Cooper*, 44 L. T. N. S. 111.

The will of a married woman requiring her husband's assent becomes invalid by his death in her lifetime, whether he has assented to it or not. *Price v. Parker*, 15 Sim. 198; *Trimmell v. Fell*, 16 B. 537; *Willock v. Noble*, L. R. 2 P. & D. 276; 8 Ch. 778; 7 H. L. 580. *In re Wilson*, *Menteith v. Campbell*, 26 W. R. 848.

The wife of a person banished for life by Act of Parliament (a), or attainted (b), and the wife of an alien enemy (c), and of a convict transported for life, though he has received a conditional pardon (d), is for testamentary purposes a *feme sole* as regards property vested in her

ex assensu  
viri.

Assent  
revoked by  
death.

Wife of  
exile and  
felon.

after her husband's disability has been incurred. *Countess of Portland v. Prodgers*, 2 Vern. 104 (a); *Newsome v. Bowyer*, 3 P. W. 37 (b); *Deerly v. Mazarine*, 1 Salk. 116 (c); *Re Martin*, 2 Rob. 405; 15 Jur. 686; *In bonis Coward*, 11 Jur. N. S. 569; 24 L. J. P. 120 (d).

The wife of a convict transported for years would seem to be in the same position notwithstanding *Ooombs v. Queen's Proctor*, 2 Rob. 547, which was not decided on the ground that the sentence was only for years and is inconsistent with *Re Harrington Trusts*, 29 Beav. 24; *Atlee v. Hook*, 23 L. J. Ch. 776.

**Aliena.** By the Naturalization Act, 1870, 33 Vict. c. 14, which is not retrospective, real and personal property may be taken, acquired, held, and disposed of by an alien in the same manner in all respects as by a natural born British subject. See *Sharp v. St. Sauveur*, 7 Ch. 343.

**Traitors, felons, and suicides.** There appears never to have been any testamentary incapacity as such, affecting traitors, felons or suicides. They were not incapable of making wills, they were only incapable of disposing of such property as was forfeited for their offence.

Thus a *felo de se* could make a will of realty which was not forfeited, and could also appoint an executor by will. *Norris v. Chambres*, 7 Jur. N. S. 59; *In bonis Bailey*, 2 Sw. & T. 156.

**Forfeiture abolished.** By 33 & 34 Vict. c. 23 forfeiture and escheat for treason and felony is abolished, and section 8 enacts that every convict shall be incapable during the time while he shall be subject to the operation of the Act of alienating or charging any property, or of making any contract.

Sections 9—17 contain provisions for the administration of the convict's property by administrators, and section 18 provides that the property shall be invested and accumulated for the benefit of the convict and his heirs and legal

personal representatives, and shall re-vest in the convict upon his ceasing to be subject to the operation of the Act, or his heirs or legal personal representatives.

The Act appears to leave the testamentary power of a convict untouched, and it would seem therefore that a convict may now dispose of his property by will.

By 42 & 43 Vict. c. 59, s. 3, outlawry in any civil proceeding is abolished.

## CHAPTER IV.

## REQUISITES FOR A VALID WILL.

Know-  
ledge of  
contents.

No will can be valid of which the testator does not know and approve the contents. *Barry v. Butlin*, 2 Moo. P. C. 480; *In bonis Duane*, 8 Jur. N. S. 752; 31 L. J. P. 173; *Sutton v. Sadler*, 3 C. B. N. S. 87; 26 L. J. C. P. 284; *Hastilow v. Stobie*, 1 P. & D. 64; *Cleare v. Cleare*, *ib.* 655; *In bonis Hunt*, 23 W. R. 553; 3 P. & D. 250; overruling *Cunliffe v. Cross*, 3 Sw. & T. 37; 32 L. J. P. 68.

Delegation  
of testa-  
mentary  
power.

A testator cannot, therefore, delegate his testamentary power to another person; that is to say, he cannot adopt and execute a will made for him without knowing its contents. *Hastilow v. Stobie*, 1 P. & D. 64; *Cleare v. Cleare*, *ib.* 655. See *ante*, p. 12.

Legatee  
preparing  
will must  
prove  
know-  
ledge.

Where a person writes or prepares a will under which he takes a benefit, it lies upon him to show that the will or the particular clause under which he takes a benefit, expresses the true will of the testator. The evidence of the beneficiary alone is insufficient. *Paske v. Ollatt*, 2 Phillim. 323; *Ingram v. Wyatt*, 1 Hagg. 388; *Billinghurst v. Vickers*, 1 Phillim. 187; *Baker v. Batt*, 2 Moo. P. C. 317; *Scoular v. Plowright*, 5 W. R. 99; 10 Moo. P. C. 440; *Fulton v. Andrew*, L. R. 7 H. L. 448; *Hegarty v. King*, 5 L. R. Ir. 249; 7 *ib.* 18.

Fiduciary  
relation.

But the influence of a person standing in a fiduciary relation to the testator may lawfully be exerted to obtain a will or legacy, so long as the testator thoroughly understands what he is doing and is a free agent; and the

burden of proof of undue influence lies upon those who assert it. *Hindson v. Wetherill*, 6 D. M. & G. 301; *Walker v. Smith*, 29 B. 394; *Parfitt v. Lawless*, 2 P. & D. 462.

The rules therefore applicable in the case of gifts *inter vivos* to persons standing in a fiduciary relation to the donor do not apply to wills. In the case of gifts *inter vivos*, such persons have to show not only that the donor intended to give, but that his intention was not influenced by the donee, a burden of proof which in most cases it is practically impossible to discharge, at any rate so long as the fiduciary relation subsists.

To establish a case of undue influence, it must be shown <sup>Undue influence.</sup> that fraud or coercion has been practised on the testator in relation to the will itself, not merely in relation to other matters or transactions. *Boyse v. Rossborough*, 6 H. L. 2; *Hall v. Hall*, 1 P. & D. 481. See *Longford v. Purdon*, 1 L. R. Ir. 75.

If a testator is prevented by threats from altering his will, the Court of Probate may, if the case is proved, declare the persons exercising the coercion trustees of the benefits they take under the will. *Betts v. Doughty*, 5 P. D. 26.

A will which has been read over to the testator, or the <sup>Will read over.</sup> contents of which have been brought to his notice before execution, must, in the absence of fraud or coercion, be presumed to have been approved by him. *Guardhouse v. Blackburn*, 1 P. & D. 109; *Goodacre v. Smith*, *ib.* 359; *Atter v. Atkinson*, *ib.* 665.

Clauses introduced into a will by fraud, accident or <sup>Fraud and mistake.</sup> mistake, without the knowledge of the testator, will be struck out of the will. *In bonis Wray*, 1 R. 10 Eq. 267; *In bonis Duane*, 2 Sw. & T. 590; 31 L. J. P. 173; *In bonis Oswald*, 3 P. & D. 162.

But where a testator has executed a will with knowledge

of the contents, nothing can be added or omitted from it after his death on the ground of mistake. *In bonis Davy*, 1 Sw. & T. 262; *Guardhouse v. Blackburn*, 1 P. & D. 109; *Harter v. Harter*, 3 P. & D. 11.

Where a residuary legatee prepares the will and is directed to give further legacies which he purposely omits, and at the time when the will is read over and executed the further legacies are not present to the mind of the testator as the residuary legatee knows, the will will nevertheless be admitted to probate. *Mitchell v. Gard*, 3 Sw. & T. 75.

The remedy in such a case would appear to be to have the residuary legatee declared a trustee so far as regards the legacies omitted. As to whether such a declaration must be obtained in the Probate Division at the time when the will is proved, see *post*, p. 69.

Omission  
of scandal-  
ous pas-  
sages.

The Court has, it seems, power to direct a passage containing a gross libel to be omitted from the probate copy of the will, though it will not exercise the power merely on the ground that the charge is offensive and untrue. *In bonis Wartnaby*, 1 Rob. 423; and *Marsh v. Marsh*, 1 Sw. & T. 528, 536, passages omitted. *Curtis v. Curtis*, 3 Add. 33; and *In bonis Honynwood*, 2 P. & D. 251, omission refused.

Proof by  
executor.

A will perfect on the face of it and signed by the testator and having an attestation clause reciting that the will has been signed and declared by the testator as his last will, in the presence of two witnesses, present at the same time, who in his presence, and in the presence of each other, have thereunto set their names as witnesses thereto, and signed by the witnesses accordingly, is *prima facie* valid, and probate may be obtained on the oath of the executor only. Williams on Executors, 7th ed. 330.

Affidavit  
of witness.

In the absence of an attestation clause, or if the attestation clause does not state the performance of the necessary ceremonies, the will must be proved by an affidavit of one of the witnesses. *Bryan v. White*, 2 Rob. 315; *Belbin*



v. *Skeats*, 1 Sw. & T. 148; *Bowman v. Hodgson*, 1 P. & D. 362; *In bonis Wilson*, 1 P. & D. 269.

If no evidence is obtainable from the attesting witnesses, <sup>Attesting witnesses dead.</sup> the will will be presumed to have been duly executed, even in the absence of an attestation clause. *Burgoyne v. Showler*, 1 Rob. 5; *In bonis Luffman*, 5 N. of C. 183; *In bonis Dickson*, 6 N. of C. 278; *Vinnicombe v. Butler*, 13 W. R. 392; *In bonis Nicks*, 34 L. J. P. 30; *In bonis Rees*, *ib.* 56; *Foot v. Stanton*, 1 Dea. 19; 2 Jur. N. S. 380; *In bonis Torre*, 8 Jur. N. S. 494; *In bonis Puddlephatt*, 2 P. & D. 97; see *In bonis Jones*, 46 L. J. P. 80; *Clarke v. Clarke*, 5 L. R. Ir. 47.

Declarations by a testator that he has duly executed his will are inadmissible as evidence of its due execution. <sup>Declarations by testator.</sup> *In bonis Ripley*, 1 Sw. & T. 68; see 1 P. D. 227.

By the Wills Act (1 Vict. c. 26), section 8, it is enacted <sup>Wills Act, s. 8.</sup> that no will shall be valid unless it shall be in writing and executed in manner thereafter mentioned.

The requirements as to execution are as follows:—in 1. <sup>Signature by testator.</sup> the first place the will must be signed at the foot or end thereof by the testator, or by some other person in his presence or by his direction.

The signature of the testator must be intended as an <sup>Intention to execute</sup> act of execution of the will. A signature to each page of the will, where the last page is left unsigned, is not *prima facie* a sufficient execution. *Sweetland v. Sweetland*, 4 Sw. & T. 6; *Burke v. Moore*, 1 R. 9 Eq. 609; *In bonis Maddock*, 3 P. & D. 169.

The mark of the testator is a sufficient signature <sup>Mark.</sup> whether he can write or not. *Baker v. Dening*, 8 A. & E. 94; *Wilson v. Beddard*, 12 Sim. 28; *In bonis Bryce*, 2 Curt. 325; *In bonis Amiss*, 2 Rob. 116; *In bonis Douce* 2 Sw. & T. 593; *In bonis Clarke*, 1 Sw. & T. 22.

A stamped name is sufficient. *Jenkyns v. Gaisford*, 3 Sw. & T. 93; 11 W. R. 854.

**Assumed name.** Signature in an assumed name is sufficient. *In bonis Glover*, 5 N. of C. 553; *In bonis Ridding*, 2 Rob. 339; *In bonis Clarke*, 1 Sw. & T. 22; *In bonis Douce*, 2 ib. 593.

**Seal.** A seal is not sufficient. *Smith v. Evans*, 1 Wils. 313; *Grayson v. Atkinson*, 2 Ves. Sen. 459; *Ellis v. Smith*, 1 Ves. J. 13, 15; *Wright v. Wakeford*, 17 Ves. 459. The case of *Lemayne v. Stanley*, 3 Lev. 1; 1 Freem. 538, is overruled.

**Dry pen.** Passing a dry pen over a written signature is not enough. *Casement v. Fulton*, 5 Moo. P. C. 130; *Playne v. Scriven*, 1 Rob. 772; see *Kevil v. Lynch*, 1 R. 9 Eq. 249.

**Signature by agent.** Another person, though he may be also an attesting witness, may by the testator's direction sign the testator's name, or impress a stamp with the testator's name engraved on it, or sign his own name on behalf of the testator. *Jenkyns v. Gaisford*, 11 W. R. 854; 3 Sw. & T. 93; *Clark's Case*, 2 Curt. 329; *In bonis Bailey*, 1 Curt. 914; *Smith v. Harris*, 1 Rob. 262.

**Connection of signature with will.** The sheets of which a will consists need not be severally signed by the testator nor be connected together, but they must be in the same room where the execution took place. *Gregory v. Queen's Proctor*, 4 N. of C. 620; *Marsh v. Marsh*, 1 Sw. & T. 528; *Bond v. Seawell*, 3 Burr. 1773.

But the signature must be physically connected with the will. *In bonis Horsford*, 3 P. & D. 211; *In bonis M'Key*, 1 R. 11 Eq. 220.

**Position of signature.** By the Wills Act Amendment Act, 1852 (15 & 16 Vict. c. 24), section 1, it is provided that a will shall be valid if the signature shall be so placed at or after or following or under or beside or opposite to the end of the will, that it shall be apparent on the face of the will that the testator intended to give effect by such his signature to the writing

signed as his will (a), and no will shall be affected by the circumstance that the signature shall not follow, or be immediately after the foot, or end of the will, or by the circumstance that a blank space shall intervene between the concluding word of the will and the signature, or by the circumstance that the signature shall be placed among the words of the testimonium clause, or of the clause of attestation (b), either with or without a blank space intervening, or shall follow (c) or be after, or under, or beside the names or one of the names of the subscribing witnesses, or by the circumstance that the signature shall be on a side or page or other portion of the paper or papers containing the will whereon no clause, or paragraph, or disposing part of the will shall be written (d) above the signature, or by the circumstance that there shall appear to be sufficient space (e) on or at the bottom of the preceding side or page, or other portion of the same paper on which the will is written to contain the signature. *In bonis Jones*, 34 L. J. P. 41; 4 Sw. & T. 1; *In bonis Williams*, 1 P. & D. 4; *In bonis Coombs*, 1 P. & D. 302 (a); *In bonis Walker*, 2 Sw. & T. 354; *In bonis Casmore*, 1 P. & D. 653; *In bonis Pearn*, 1 P. D. 70 (b); *In bonis Puddlephatt*, 2 P. & D. 97; *In bonis Horsford*, 3 P. & D. 211 (c); *In bonis Wright*, 34 L. J. P. 104; 4 Sw. & T. 35; *Hunt v. Hunt*, 1 P. & D. 209; *In bonis Archer*, 2 P. & D. 252; *In bonis Wotton*, 3 P. & D. 159 (d); *In bonis Williams*, 1 P. & D. 4 (e).

The same section enacts that no signature shall be operative to give effect to any disposition or direction which is underneath or which follows it, nor shall it give effect to any disposition or direction inserted after the signature shall be made. See *In bonis Greator*, 2 Jur. N. S. 1172; *In bonis Dallow*, 1 P. & D. 189; *In bonis Ainsworth*, 2 P. & D. 151; *In bonis Dearle*, 39 L. T. N. S. 93; *In bonis Arthur*, 2 P. & D. 273.

Words  
under  
signature.

If the signature of the testator intended to be in execution of the will is followed by words intended to form part of the will, effect may be given to the part of the will preceding the signature, if that part in effect constitutes the whole of the dispositive portion of the will. *Keating v. Brooks*, 2 Curt. 421; 4 N. of C. 260; *In bonis Davis*, 3 Curt. 748; *In bonis Cotton*, 6 N. of C. 307; 1 Rob. 658; see *In bonis Topham*, 7 N. of C. 272; 2 Rob. 189; *Sweetland v. Sweetland*, 4 Sw. & T. 6, in which case the question was whether there was a due execution of any part of the will.

The same rule applies if the words following the signature contain unimportant bequests or appoint executors only. *In bonis Standley*, 7 N. of C. 69; 1 Rob. 755; *In bonis Amiss*, 7 N. of C. 274; 2 Rob. 116.

2. Signature must be witnessed.

In the second place, the signature shall be made or acknowledged by the testator in the presence of two or more witnesses present at the same time.

The signature of the testator must be written or acknowledged by the testator in the presence of both witnesses together, before either of them attest and subscribe the will. *In bonis Allen*, 2 Curt. 331; *In bonis Olding*, *ib.* 865; *In bonis Byrd*, 3 *ib.* 117; *Moore v. King*, *ib.* 243; *Pennant v. Kingscote*, *ib.* 643; *In bonis Summers*, 2 Rob. 295; *Cooper v. Bockett*, 3 Curt. 648; 4 Moo. P. C. 419; *Hindmarsh v. Charlton*, 1 Sw. & T. 433; 8 H. L. 160.

Will not void for incompetency of witness.

The Wills Act (1 Vict. c. 26), s. 14, provides that if any person who shall attest the execution of a will shall, at the time of the execution thereof or at any time afterwards, be incompetent to be admitted a witness to prove the execution thereof, such will shall not, on that account, be invalid.

Section 15 enacts in effect that a will attested by a beneficiary under the will is valid, though the gift to the attesting witness is void.

Section 16 enacts that, in case by any will any real or personal estate shall be charged with any debt or debts, and any creditor, or the wife or husband of any creditor, whose debt is so charged, shall attest the execution of such will, such creditor, notwithstanding such charge, shall be admitted a witness to prove the execution of such will, or to prove the validity or invalidity thereof.

Section 17 enacts that no person shall, on account of his being an executor of a will, be incompetent to be admitted a witness to prove the execution of such will or a witness to prove the validity or invalidity thereof.

Where the testator writes something on the will in the presence of the witnesses summoned to attest the will, it will be presumed that he wrote his signature, though the witnesses may not see the signature and may not know that the document is his will. *Smith v. Smith*, 1 P. & D. 143.

a. Signature made in presence of witnesses.

The acknowledgment may be by gestures. *In bonis Davies*, 2 Rob. 337; *In bonis Owston*, 10 W. R. 410.

b. Acknowledgment of signature already made.

Acknowledgment by a third person in the hearing of the testator, and acquiesced in by him, is an acknowledgment by the testator. *In bonis Jones*, Dea. & Sw. 3; *In bonis Bosanquet*, 2 Rob. 577; *Faulds v. Jackson*, 6 N. of C., supp. 12; *Inglesant v. Inglesant*, 3 P. & D. 172.

It is clear that if the will is acknowledged to be the testator's will, and the witnesses see the signature of the testator, that is sufficient. *In bonis Dinmore*, 2 Rob. 641; *In bonis Philpot*, 3 N. of C. 2.

Will acknowledged; signature seen.

Further, if the testator acknowledges a document as his will, or gives the witnesses to understand that it is his will, it is not necessary that he should expressly acknowledge his signature, or even that the witnesses should see the signature, if there is nothing on the face of the will to lead to the presumption that the signature was added afterwards. *Lloyd v. Roberts*, 12 Moo. P. C. 158; *In*

Will acknowledged; signature not seen.

*bonis Warden*, 2 Curt. 334; *Blake v. Knight*, 3 Curt. 547; *Gwillim v. Gwillim*, 3 Sw. & T. 200; 29 L. J. Prob. 31; *In bonis Huckvale*, 1 P. & D. 375; *Cooper v. Bockett*, 3 Curt. 648; 4 Moo. P. C. 419; *Beckett v. Howe*, 2 P. & D. 1; *Kelly v. Keatinge*, I. R. 5 Eq. 174; *In bonis Pearn*, 1 P. D. 71. The cases of *Hudson v. Parker*, 1 Rob. 14; *In bonis Trinder*, 3 N. of C. 275, are overruled.

Signature  
seen; will  
not ac-  
know-  
ledged.

A request to sign a paper not declared to be a will, when the witnesses see the signature of testator, though it is not acknowledged by the testator as his signature, is sufficient. *Keigwin v. Keigwin*, 3 Curt. 607; *Gaze v. Gaze*, 3 Curt. 451; *In bonis Ashmore*, 3 Curt. 756; *In bonis Thomson*, 4 N. of C. 643; *Faulds v. Jackson*, 6 N. of C. suppl. 1; *Leech v. Bates*, 6 N. of C. 704; *Inglesant v. Inglesant*, 3 P. & D. 172; see, however, *In bonis Arthur*, 2 P. & D. 273.

Signature  
not seen;  
will not  
acknow-  
ledged.

But a mere request to witnesses to attest an instrument, the nature of which is not explained to them, and the signature to which they do not see, is not sufficient. *In bonis Ashton*, 5 N. of C. 548; *In bonis Rawlins*, 2 Curt. 326; *In bonis Hammond*, 3 Sw. & T. 90; *In bonis Harrison*, 2 Curt. 863; *In bonis Pearson*, 33 L. J. P. 177; *Ilott v. Genge*, 3 Curt. 160; 4 Moo. P. C. 265; *Hudson v. Parker*, 1 Rob. 14; *In bonis Trinder*, 3 N. of C. 275; *Shaw v. Neville*, 1 Jur. N. S. 408; *In bonis Swinford*, 1 P. & D. 630; *Pearson v. Pearson*, 2 P. & D. 451; *Fischer v. Popham*, 3 P. & D. 246.

When the testator's will is signed by some other person by his direction, the signature must be acknowledged by the testator in presence of two witnesses; it is not sufficient that the witnesses see the signature written if they are not present when the testator directs the signature to be made, and the will is not acknowledged as a will. *Burke v. Moore*, I. R. 9 Eq. 609.

In the third place, such witnesses shall attest and sub-  
scribe the will in the presence of the testator, but no form  
of attestation is necessary. 3. Signa-  
ture by  
witnesses.

The witnesses must subscribe in the presence of the  
testator, but they need not subscribe in the presence of  
each other. *White v. British Museum*, 6 Bing. 310; *Wit-  
nesses  
need not  
sign in  
each  
other's  
presence.*  
*Faulds v. Jackson*, 6 N. of C. sup. 1; *In bonis Webb*, 1  
Jur. N. S. 1096; 2 *ib.*, 309; *Sullivan v. Sullivan*, 3 L. R.  
Ir. 299; see *Casement v. Fulton*, 5 Moo. P. C. 14.

The witnesses will be considered to have subscribed in  
the presence of the testator if, under the circumstances,  
the testator might have seen them if he had chosen to  
look, though he may not have seen them. *Shires v.*  
*Glascok*, 2 Salk. 688; *Davy v. Smith*, 3 Salk. 395; *Todd*  
*v. Winchelsea*, M. & Malk. 12; 1 C. & P. 488; *Casson v.*  
*Dade*, 1 B. C. C. 99; *Doe v. Manifold*, 1 M. & S. 249;  
*Winchelsea v. Wauchope*, 3 Russ. 441; *In bonis Newman*,  
1 Curt. 914; *In bonis Ellis*, 2 *ib.*, 395; *Newton v. Clarke*,  
2 *ib.* 320; *In bonis Colman*, 3 *ib.* 118; *Tribe v. Tribe*, 7  
N. of C. 132; 1 Rob. 775; *Norton v. Bazett*, Dea. & Sw.  
259; 2 Jur. N. S. 766; 3 Jur. N. S. 1084; *In bonis Trin-  
mell*, 11 Jur. N. S. 248; *In bonis Piercy*, 1 Rob. 278;  
*Jenner v. Finch*, 5 P. D. 106. Presence  
of the  
testator.

The signatures of the witnesses need not be in any  
particular part of the will, if it appears that they were  
intended to attest the operative signature of the testator.  
*In bonis Davis*, 3 Curt. 748; *In bonis Chamney*, 1 Rob.  
757; *Roberts v. Phillips*, 4 E. & B. 450; *In bonis Wilson*,  
1 P. & D. 269; *In bonis Pearse*, 1 P. & D. 382; *In bonis*  
*Braddock*, 1 P. D. 433. Position of  
signatures.

But the signatures, if not on the same paper as the  
will, must be on a paper physically connected with it.  
*In bonis West*, 12 W. R. 89; *In bonis Saunders*, 31  
L. J. P. 53; *Cook v. Lambert*, 32 L. J. P. 93; 3 Sw.  
& T. 46; *In bonis Gausden*, 2 Sw. & T. 362; *In bonis*  
Signatures  
must be  
connected  
with will.

*MKey*, I. R. 11 Eq. 220; *In bonis Braddock*, 1 P. D. 433.

Witnesses  
must  
attest  
operative  
signature.

The witnesses must attest the signature, which is intended as an execution of the will; and where there are several signatures, the attestation of any but that intended as an execution of the will is invalid to give effect to the will or any part of it. *In bonis Martin*, 6 N. of C. 694; 1 Rob. 712; *Ewen v. Franklin*, Deane 7, 1 Jur. N. S. 1220; *Sweetland v. Sweetland*, 4 Sw. & T. 6; 34 L. J. P. 42; 13 W. R. 504; *Phipps v. Hale*, 3 P. & D. 166; *In bonis Dilkes*, 3 P. & D. 164.

Intention  
to attest.

The attesting witnesses must subscribe with the intention, that the subscriptions made should be a complete attestation of the will, and evidence is admissible to show whether such was the intention or not. *In bonis Wilson*, 1 P. & D. 269; *In bonis Sharman*, 1 P. & D. 661; *Griffiths v. Griffiths*, 2 P. & D. 300; *In bonis Murphy*, I. R. 8 Eq. 300.

Adding an address to, or correcting a signature already made, or writing a Christian name when the witness is unable to complete his signature, is insufficient. *In bonis Trevanion*, 2 Rob. 315; 14 Jur. 919; *Hindmarsh v. Charlton*, 1 Sw. & T. 433; 8 H. L. 160; *In bonis Maddock*, 3 P. & D. 169; *MConville v. MCreesh*, 3 L. R. Ir. 73.

So a witness writing the name of a second witness opposite the mark of the latter cannot be said to subscribe. *In bonis Eynon*, 3 P. & D. 92.

A signature made without any intention of attesting will be excluded from probate. *In bonis Sharman*, 1 P. & D. 661; *In bonis Murphy*, I. R. 8 Eq. 300.

Form of  
signature.

Witnesses need not sign by name; initials, or a description, or a mark, are sufficient. *In bonis Christian*, 2 Rob. 110; 7 N. of C. 265; *In bonis Martin*, 6 N. of C. 694; *In bonis Sperling*, 3 Sw. & T. 272; 12 W. R. 354; *In bonis Amiss*, 2 Rob. 116; *In bonis Ashmore*, 3 Curt. 756.



But a seal is insufficient. *In bonis Byrd*, 3 Curt. 117.

One witness cannot sign for another. *In bonis White*, 2 N. of C. 461; *In bonis Middleton*, 33 L. J. P. 16; *Re Duggins*, 39 L. J. P. 34.

Nor can a third person sign for a witness. *In bonis Cope*, 2 Rob. 335; *Pryor v. Pryor*, 29 L. J. P. 114.

But a witness or a third person may guide the hand of the second witness, or may subscribe for the witness if the witness holds the top of the pen while the signature is being made. *Harrison v. Elvin*, 3 Q. B. 117, 2 G. & D. 769; *In bonis Frith*, 4 Jur. N. S. 288; 27 L. J. P. 6; *In bonis Lewis*, 31 L. J. P. 153; 7 Jur. N. S. 688; see *In bonis Kilcher*, 6 N. of C. 15.

The papers found at the testator's death to compose his will must, in the absence of proof to the contrary, be presumed to be the will executed by him. *Gregory v. Queen's Proctor*, 4 N. of C. 620; *Marsh v. Marsh*, 1 Sw. & T. 528; *Rees v. Rees*, 3 P. & D. 84.

## CHAPTER V.

## ALTERATIONS, INTERLINEATIONS AND ERASURES.

Blank  
spaces.

It is immaterial that the will contains blank spaces or even a blank page. *Corneby v. Gibbons*, 1 Rob. 705. *In bonis Rice*, I. R. 5 Eq. 176. *In bonis Wotton*, 3 P. & D. 159.

Oral and written declarations of a testator made before or after the execution of the will are admissible in evidence for the purpose of showing what were the constituent parts of the will at the time of execution. *Gould v. Lakes*, 1 P. D. 6.

Evidence  
when  
alterations  
made.

Where a will contains obliterations, additions, or other alterations, evidence must, if possible, be produced to show when they were made. *In bonis Hindmarch*, 1 P. & D. 307; *In bonis Duffy*, I. R. 5 Eq. 506; *Moore v. Moore*, I. R. 6 Eq. 166.

For this purpose declarations of the testator with regard to his testamentary intentions made before the date of the will are admissible. *Doe v. Palmer*, 15 Q. B. 747. *In bonis Sykes*, 3 P. & D. 26; *Dench v. Dench*, 2 P. D. 60.

The fact that a date earlier than the date of the will is annexed to alterations is not alone sufficient to show that they were made before execution. *In bonis Adamson*, 3 P. & D. 253.

Presump-  
tion as to  
altera-  
tions.

Alterations made in ink before execution will be presumed to be final. *Gann v. Gregory*, 3 D. M. & G. 780; *Ibbott v. Bell*, 35 B. 395.

Alterations made before execution in pencil, the will being written in ink, are *prima facie* deliberative, and the original writing will have effect. *Hawkes v. Hawkes*, 1 Hagg. 322; *Edward v. Astley*, *ib.* 490; *Ravenscroft v. Hunter*, 2 *ib.* 68; *Parkin v. Bainbridge*, 3 Phillim. 321; *Lavender v. Adams*, 1 Add. 403; *Bateman v. Pennington*, 3 Moo. P. C. 223; *Francis v. Groves*, 5 H. 39; *In bonis Hall*, 2 P. & D. 256; *In bonis Adams*, *ib.* 367. See *In bonis Bellamy*, 14 W. R. 501.

Alterations and additions made in a will complete without them must be presumed, in the absence of evidence, to have been made after the execution of the will or any subsequent codicil. *Cooper v. Bockett*, 4 N. of C. 685; 4 Moo. P. C. 419; *Simmons v. Rudall*, 1 S. N. S. 115; *Greville v. Tylee*, 7 Moo. P. C. 320; *Gann v. Gregory*, 3 D. M. & G. 780; *Doe v. Palmer*, 16 Q. B. 747; *Williams v. Ashton*, 1 J. & H. 115; *Christmas v. Whinyates*, 3 Sw. & T. 81; *In bonis Sykes*, 3 P. & D. 26.

Alterations and additions made in a will which would be incomplete without them, must be presumed to have been made before execution. *In bonis Cadge*, 1 P. & D. 543; *Birch v. Birch*, 1 Rob. 675; 6 N. of C. 581; *In bonis Swinden*, 2 Rob. 192; *Greville v. Tylee*, 7 Moo. P. C. 320; *In bonis Birt*, 2 P. & D. 214; *In bonis Adams*, *ib.* 367; *In bonis King*, 23 W. R. 552. See, however, *In bonis White*, 30 L. J. P. 55.

The Wills Act (1 Vict. c. 26), s. 21, enacts that no obliteration, interlineation, or other alteration made in any will after the execution thereof shall be valid or have any effect, except so far as the words or effect of the will before such alteration shall not be apparent, unless such alteration shall be executed in like manner as hereinbefore is required for the execution of the will; but the will, with such alteration as part thereof, shall be deemed to be duly executed if the signature of the testator and the subscription of the

Deliberative alterations.

Presumption as to date of alteration.

Wills Act, s. 21.

witnesses be made in the margin, or on some other part of the will opposite or near to such alteration, or at the foot or end of or opposite to a memorandum referring to such alteration, and written at the end or some other part of the will.

An alteration opposite which the testator and two witnesses have set their initials in the margin is sufficiently executed under this section. *In bonis Blewitt*, 49 L. J. P. 31; 5 P. D. 116; see, too, *In bonis Treeby*, 3 P. & D. 242; *In bonis Shearn*, 50 L. J. P. 15.

Obliteration complete.

Where the original is completely obliterated and not ascertainable, the will must be considered blank, so far as the obliteration, interlineation or other alteration is concerned. *In bonis Ibbetson*, 2 Curt. 337; *Townley v. Watson*, 3 Curt. 761; *In bonis James*, 1 Sw. & T. 238.

The Court will only endeavour to discover the original by the use of glasses or similar means, and not by the use of chemicals, or removal of any substance from the will. *In bonis Beavan*, 2 Curt. 369; *In bonis Horsford*, 3 P. & D. 211; *In re Nelson*, I. R. 6 Eq. 569. See *Lushington v. Onslow*, 6 N. of C. 183.

It appears to be clear that no external evidence would be admitted to show what the original words were, except in a case of dependent relative revocation (see *post*, p. 39). *In bonis Horsford*, 3 P. & D. 211; *In re Nelson*, I. R. 6 Eq. 569. See *Townley v. Watson*, 3 Curt. 761.

## CHAPTER VI.

## REVOCATION.

SECTION 18 of the Wills Act enacts that every will made by a man or woman shall be revoked by his or her marriage (except a will made in exercise of a power of appointment when the real or personal estate thereby appointed would not in default of such appointment pass to his or her heir, customary heir, executor, or administrator, or the person entitled as his or her next of kin, under the Statute of Distributions). Will to be revoked by marriage.

A will, though made in contemplation of marriage, is revoked by marriage. *In bonis Cadzowold*, 1 Sw. & T. 34; *Marston v. Doe d. Fox*, 8 A. & E. 14; *Israel v. Rodon*, 2 Moo. P. C. 51

A will made in exercise of a power is not revoked by marriage where the heir, executor, or administrator, or statutory next of kin, would not in all events take in default of appointment. Will under power. *In bonis Fenwick*, 1 P. & D. 319; *In bonis Worthington*, 20 W. R. 260.

Nor is such a will revoked by marriage if the persons taking in default of appointment, though they may in fact be the heirs or statutory next of kin of the donee of the power, do not take in that capacity under the instrument creating the power.

Thus the will is not revoked if the gift in default of appointment is to children of the testator, or to next of kin simply instead of statutory next of kin. *In bonis Fitzroy*, 1 Sw. & T. 133; *In bonis McVicar*, 1 P. & D. 671.

Where the limitation of real estate in default of appoint-

ment is to the donee, her heirs or assigns, the will is revoked by marriage. *Vaughan v. Vanderstegen*, 2 Dr. 165, 168.

No will to be revoked by presumption.

By the Wills Act (1 Vict. c. 26), s. 19, it is enacted that no will shall be revoked by any presumption of an intention on the ground of an alteration of circumstances.

No will to be revoked but by another will or codicil, or by destruction.

Section 20 enacts that no will or codicil, or any part thereof, shall be revoked otherwise than as aforesaid, or by another will or codicil executed in manner hereinbefore required, or by some writing declaring an intention to revoke the same, and executed in the manner in which a will is hereinbefore required to be executed, or by the burning, tearing, or otherwise destroying the same by the testator, or by some person in his presence, and by his direction, with the intention of revoking the same.

Revocation while insane invalid.

Revocation while the testator is of unsound mind is ineffectual, though he may subsequently recover. *Borlase v. Borlase*, 4 N. of C. 106; *Brunt v. Brunt*, 3 P. & D. 37.

A will left in the possession of a testator who subsequently becomes insane, and revoked by him, must be shown to have been revoked while he was of sound mind. *Harris v. Berrall*, 1 Sw. & T. 153; *Sprigge v. Sprigge*, 1 P. & D. 608.

Act of destruction not done *animo revocandi*.

Revocation is in all cases a question of intention, and if the act done, though in itself sufficient to revoke a testamentary instrument, can be shown to have been done for a purpose other than revocation, it will not revoke the instrument.

Thus destruction of a will on the erroneous supposition that it is invalid (a), or that it has been revoked or become useless (b), or that another instrument is valid (c), will not effect a revocation. *Giles v. Warren*, 2 P. & D. 401 (a); *Scott v. Scott*, 1 Sw. & T. 258; *Clarkson v. Clarkson*, 2 Sw. & T. 497; 31 L. J. P. 143; *In bonis Middleton*, 3 Sw. & T. 583; 10 Jur. N. S. 1109 (b); *Hyde v. Hyde*, 1 Eq.

Ab. 409; *Onions v. Tyrer*, 1 P. Wms. 345; *Perrott v. Perrott*, 14 East, 423; *Dancer v. Crabb*, 3 P. & D. 98 (c).

Some of the cases above cited have been called cases of dependent relative revocation. They are really cases in which there was no *animus revocandi* whatever. The instruments were destroyed, not with a view to revoke them, but because the testator thought they had been revoked.

In the same way the destruction of a codicil which has revived a revoked will, will not revoke the will if it appears that the codicil was destroyed on the supposition that the will would still stand. *James v. Shrimpton*, 1 P. D. 431.

So, too, an act of destruction done merely for the purpose of making a fair copy of the will, or to improve the handwriting, has no revocatory effect. *In bonis Kennett*, 2 N. R. 461; *In bonis Applebee*, 1 Hag. 144; *In bonis Tozer*, 2 N. of C. 11.

A revocation made with a view of making or reviving some other disposition will only take effect if such other disposition is effectually made or revived. *Onions v. Tyrer*, 1 P. Wms. 345; 2 Vern. 742; Prec. Ch. 459; 1 Eq. Ab. 408; *Ex parte Ilchester*, 7 Ves. 348, 372; *Lord Thynne v. Stanhope*, 1 Add. 52.

Dependent  
relative  
revocation.

But to bring the case within this doctrine it must appear that the testator considered the substitution of some valid disposition as part of the act of revocation at the time when the act was done.

The mere revocation of a will, followed by a subsequent ineffectual disposition, will not set up the original will if the two acts are not so connected, that it can be said the substitution of an effectual disposition was the condition of the revocation of the original will. *In bonis Mitcheson*, 32 L. J. P. 202; *In bonis Weston*, 1 P. & D. 633; *In bonis Gentry*, 3 P. & D. 80.

The point in these cases is not, that a revoked will is set

up again, if a subsequent disposition is ineffectual, but that the original will is not itself intended to be revoked, unless or until an effectual disposition of the property is made. See *Powell v. Powell*, 1 P. & D. 209; *In bonis Weston*, 1 P. & D. 633; *Eckersley v. Platt*, 1 P. & D. 281.

In cases of revocation the intention of the testator may always be proved by evidence.

Will  
revoked  
to make  
fresh will.

Thus, if a will is shown to have been cancelled for the purpose of making a fresh will, the original will is not revoked if no fresh will is made. *In bonis De Bode*, 5 N. of C. 189; *In bonis Eeles*, 2 Sw. & T. 600.

Nor, under similar circumstances, is the old will revoked if the fresh will, though made, is not effectual. *Hyde v. Mason*, Vin. Abr. Devise, R. 2, pl. 17; Com. 451; 1 Lee, 423, note (a); *Dancer v. Orabb*, 3 P. & D. 98.

To set up  
prior will.

Similarly, a will cancelled in order to set up a prior will, which cannot be so set up, is not thereby revoked. *Powell v. Powell*, 1 P. & D. 209; see *Dickinson v. Swatman*, 4 Sw. & T. 205; *Eckersley v. Platt*, 1 P. & D. 281; *In bonis Weston*, 1 P. & D. 633.

Perhaps where a will is cancelled upon the execution of another invalid instrument, which differs from the cancelled will only in matters of detail, such as the persons appointed trustees, the fact that the dispositions in the two documents are the same would, even in the absence of express evidence of intention, be sufficient to show that the prior will was only intended to be revoked if the second instrument was effectual. See *Onions v. Tyrer*, 1 P. Wms. 345; *Short v. Smith*, 4 East, 419; *In bonis Middleton*, 3 Sw. & T. 583.

Obliteration  
of  
part of  
legacy.

Upon the same principle, when the amount of a bequest is obliterated after the execution of the will, and a different, even though it may be a smaller, amount is written over or interlineated, the substituted bequest, being incap-



able of taking effect, the original bequest remains, the inference being that it was the testator's intention to revoke the original bequest only if the substituted bequest was effectually made. *Brooke v. Kent*, 3 Moo. P. C. 334, overruling *In bonis Brooke*, 2 Curt. 343; *Soar v. Dolman*, 3 Curt. 121, overruling S. C. *in nom. In bonis Rippin*, 2 Curt. 332; *In bonis Horsford*, 3 P. & D. 211; *In re Nelson*, I. R. 6 Eq. 569; see *Kirke v. Kirke*, 4 Russ. 435; *Locke v. James*, 11 M. & W. 901; *Winson v. Pratt*, 2 B. & B. 650. The case of *In bonis Livock*, 1 Curt. 906, is overruled.

In such a case evidence is admissible to show what the original legacy was, and if necessary the Court will employ chemical means to ascertain it. *In bonis Horsford*, *supra*—see *ante*, p. 34.

If there is an erasure simply, without any substitution Erasure without interlineation. or interlineation, the doctrine does not apply, even though the erasure may be of part of a legacy—as, for instance, where a legacy of one hundred and fifty pounds is given, and the words “and fifty” are erased. *In bonis Ibbetson*, 2 Curt. 337; *In bonis Horsford*, 3 P. & D. 211; *In re Nelson*, I. R. 6 Eq. 569.

The distinction between a case where the words “one hundred and fifty” are obliterated and the word “fifty” is written over them, and a case where the words “one hundred and” are obliterated, leaving the word “fifty,” is somewhat thin.

Upon similar principles, when the name of an executor Erasure of name of executor. has been obliterated and another executor substituted after the execution of the will, the name of the original executor will be restored, if it can be shown by external evidence what the name was. The presumption that the testator intended to appoint some executor or other is a strong one. *In bonis Parr*, 29 L. J. P. 70; 6 Jur. N. S. 56; *In bonis Harris*, 1 Sw. & T. 536; 29 L. J. P. 79.

Erasure of  
name of  
legatee.

It is clear that, where the name of a legatee is obliterated, and that of another legatee substituted after execution, and there is no further evidence of intention, no case of dependent relative revocation arises. Under such circumstances, however, a case of dependent relative revocation may be raised by proper evidence.

Thus, if it appears from external evidence that a gift has been made to a person only on the supposition by the testator that another person was incapable of taking, and after the execution of the will the name of the first person has been obliterated and the name of the second substituted, the original legatee takes on the ground that he was intended to take in the event of the substituted legatee being incapable of taking. *In bonis McCabe*, 3 P. & D. 94.

Distinction  
between  
cases of  
probate  
and cases  
of construction.

The cases on the doctrine of dependent relative revocation so far discussed have been cases in the Probate Court, where evidence of testamentary intention is always admissible.

Precisely the same doctrine applies in a Court of Construction, the only difference being that the intention to revoke a former gift only if a subsequent gift is effectually made must appear on the face of the instrument. No external evidence to prove the dependency of the two gifts is admissible.

Thus, if a legacy is given by will to A, and by a codicil the legacy to A is revoked, and the same legacy is given to B, who predeceases the testator, or for other reasons is incapable of taking, the legacy to A is nevertheless revoked. There is in such a case nothing to show that the legacy to A was only to be revoked if the legacy to B was effectually made, or in other words, no case of dependent relative revocation is made out. *French's Case*, Rolle's Ab. Devise, O. 4; *Tupper v. Tupper*, 1 K. & J. 665; *Nevill v. Boddam*, 25 B. 554; *Quinn v. Butler*, 6 Eq. 225; *Baker v. Story*, 23 W. R. 147.

Incapacity  
of legatee.

It has been said that the doctrine of dependent relative

revocation has no application, where the second disposition fails not from the infirmity of the instrument, but from the incapacity of the devisee. 1 Jarm. 156, 3rd ed.; Wms. Exors. 153.

But this is a mere distinction of fact and not of principle. It may even be doubted whether it reconciles the cases in fact. See *Quinn v. Butler*, 6 Eq. 225. The true theory seems to be, that the doctrine of dependent relative revocation applies equally where the second legatee is incapacitated from taking, provided the case can be brought within the doctrine, or in other words, provided it can be shown that the original legacy was intended to be revoked only in the event of the second taking effect. The mere fact that a legacy is revoked and a different legacy to a different legatee substituted, affords no argument either in the Court of Probate or in a Court of Construction that the capacity of the second legatee to take was the condition of the revocation of the earlier legacy.

A subsequent will is no revocation of a former one if the contents of the later will are unknown, or if, though it is known that the later will differed from the former one, it is unknown in what respects it differed. *Hitchins v. Basset*, 3 Mod. 204; 2 Salk. 592; Show. P. C. 146; *Dickinson v. Stidolph*, 11 C. B. N. S. 341, 357.

Where there are several testamentary instruments which are not inconsistent, they will together be considered the will of the testator so far as they are not inconsistent. *In bonis Budd*, 3 Sw. & T. 196; *Berks v. Berks*, 4 Sw. & T. 23; *Lemage v. Goodban*, 1 P. & D. 57; *In bonis Fenwick*, *ib.* 319; *In bonis Griffith*, 2 *ib.* 457; *In bonis Patchell*, 3 *ib.* 153; *In bonis Hartley*, 50 L. J. P. 1.

The fact that both instruments appoint a person sole executor will not cause the later instrument to revoke the former. *In bonis Leese*, 2 Sw. & T. 442; *In bonis Graham*, 3 *ib.* 69; *Geaves v. Price*, 3 *ib.* 71.

Inconsis-  
tent instru-  
ments.

Where a subsequent will disposes or shows an intention of disposing of all the testator's property, it will be held to have revoked a prior will *in toto*, whether the dispositions contained in the subsequent will are different from the earlier dispositions or not. *Henfrey v. Henfrey*, 2 Curt. 468; 4 Moo. P. C. 29; *Pepper v. Pepper*, 1 R. 5 Eq. 85; *Plenty v. West*, 2 Phillim. 264; *Cottrell v. Cottrell*, 2 P. & D. 397; *Dempsey v. Lawson*, 2 P. D. 98; *O'Leary v. Douglass*, 3 L. R. Ir. 323.

Where there are two testamentary instruments, and from the nature of the documents and the surrounding circumstances it is doubtful whether the later was intended to be in substitution for the earlier one, evidence is admissible to show the intention. *Jenner v. Finch*, 49 L. J. Ch. 25; 5 P. D. 106.

Last will.

The description of a testamentary document as the last will of the testator will not alone have the effect of revoking prior testamentary papers. *Cutto v. Gilbert*, 9 Moo. P. C. 131; *Stoddart v. Grant*, 1 Macq. 171; *Lemage v. Goodban*, 1 P. & D. 57; *Leslie v. Leslie*, 1 R. 6 Eq. 332; *Freeman v. Freeman*, Kay, 479; 5 D. M. & G. 704; *In bonis De la Saussaye*, 3 P. & D. 42.

Clause of  
revocation.

A will containing a clause revoking all former wills will not, without more, revoke a will made in execution of a power, though the second will may contain such general words as would execute the power. *In bonis Meredith*, 29 L. J. P. 155; *In bonis Joys*, 30 L. J. P. 169; *In bonis Merritt*, 1 Sw. & T. 112; 7 W. R. 543; see *Richardson v. Barry*, 3 Hag. 249.

But the former will is revoked if the subsequent will contains an express reference to the power, or disposes of the property subject to the power, though it may not dispose of all of it. *Richardson v. Barry*, 3 Hagg. 249; *In bonis Eustace*, 3 P. & D. 183; *Harvey v. Harvey*, 23 W. R. 478.

Codicil

A codicil reviving a revoked will thereby revokes a will

intermediate in date between the first revoked will and the codicil, and inconsistent with the first will. *Lord Walpole v. Orford*, 3 Ves. 402; *In bonis Reynolds*, 3 P. & D. 35. reviving  
revoked  
will.

Where will A is revoked by will B and destroyed, and there is a codicil, purporting to revive will A but ineffectual to do so, because will A is not in existence, the question arises, whether will B is revoked. Codicil  
reviving  
destroyed  
will.

The cases on the subject are complicated. The rule appears to be, that if there are no dispositions in the codicil inconsistent with will B, the mere fact, that the codicil is described as a codicil to will A, does not revoke will B. *Rogers v. Goodenough*, 2 Sw. & T. 342.

On the other hand, if the codicil contains dispositions inconsistent with will B, or expressly confirms will A, it seems will B is revoked and the codicil alone is admissible to probate. *Hale v. Tokelove*, 2 Rob. 318; *Newton v. Newton*, 12 Ir. Ch. 118.

The destruction or cancellation of a will whereby it is revoked will not revoke a codicil. *In bonis Dutton*, 3 Sw. & T. 66; *In bonis Ellice*, 12 W. R. 353; *In bonis Halliwell*, 4 N. of C. 400; *In bonis Coulthard*, 11 Jur. N. S. 184; *Tagart v. Hooper*, 1 Curt. 289; *Black v. Jobling*, 1 P. & D. 685; *In bonis Savage*, 2 ib. 78; *In bonis Turner*, ib. 403. Revoca-  
tion of  
codicil.

Where a will is revoked by a subsequent codicil, it would be a question of construction, whether intermediate codicils are also revoked. Effect of  
codicil re-  
voking  
will on  
earlier  
codicils.

If the revoking codicil refers to the will by date, or distinguishes between the will and subsequent codicils, the latter are not revoked. *Farrer v. St. Catherine's Coll.*, 16 Eq. 19; see *Bunny v. Bunny*, 3 B. 109; *Pratt v. Pratt*, 14 Sim. 129.

The re-execution of a will, containing a clause revoking all former testamentary instruments, will not revoke a Re-execu-  
tion of  
will con-

taining  
clause of  
revocation.      codicil to the will, at any rate if the object of the re-execution appears to have been to give effect to alterations in the will, or if there is evidence to show that revocation of the codicil was not intended. *Wade v. Nazer*, 1 Rob. 627; *Upfill v. Marshall*, 3 Curt. 636; *In bonis Rawlins*, 48 L. J. P. 64; 28 W. R. 139.

Codicil  
confirming  
will.      A codicil making an alteration in a will, referred to as a will of a particular date, and confirming that will, does not revoke intermediate codicils. *Smith v. Cunningham*, 1 Add. 448; *Crosbie v. Macdoul*, 4 Ves. 610; *In bonis De la Saussaye*, 3 P. & D. 42; *Green v. Tribe*, 9 Ch. D. 231.

Testa-  
mentary  
letter.      A letter, duly signed and attested, requesting a third person to destroy the testator's will, is sufficient to revoke it. *In bonis Durance*, 2 P. & D. 406.

Revoca-  
tion by  
succession  
of acts.      Where a testator intends to revoke his will by the performance of a succession of acts, some only of which he actually performs, the will is not revoked, though the acts performed might alone be sufficient to revoke it if the testator intended to do no more. *Doe v. Perkes*, 3 B. & A. 489; *In bonis Colberg*, 2 Curt. 832; *Elms v. Elms*, 1 Sw. & T. 155. See, too, *Winson v. Pratt*, 2 B. & B. 650; *Locke v. James*, 11 M. & W. 901; *Kirke v. Kirke*, 4 Russ. 435; *Doe v. Harris*, 6 A. & E. 209; 2 N. & P. 615.

Acts done  
must be  
those  
named in  
statute.      But though a testator may have done everything which he considered necessary to revoke his will, the will is not revoked if he has not adopted one or other of the modes of revocation pointed out in section 20. (See *ante*, p. 36.)

Thus, writing across a will that it is revoked, and throwing it into the waste paper basket, will not revoke the will if it is in fact preserved. *Cheese v. Lovejoy*, 2 P. D. 251. See *Andrew v. Motley*, 12 C. B. N. S. 514.

Revoca-  
tion by  
third  
person.      The revocatory acts, if done by a third person by the testator's direction, must also be done in his presence.

Thus, a will burnt by the testator's order but not in his presence is not revoked. *In bonis Dadds*, Dea. & Sw. 290.

Striking through the will or the signature of the testator with a pen is not sufficient to revoke his will. *Striking through signature.* *Stephens v. Taprell*, 2 Curt. 458; *In bonis Rose*, 4 N. of C. 101; *Benson v. Benson*, 2 P. & D. 172; *Re Brewster*, 6 Jur. N. S. 56.

A will found in the possession of the testator with the signature cut off will, in the absence of evidence to the contrary, be presumed to be revoked. *Tearing off signature.* *In bonis Lewis*, 1 Sw. & T. 31; *Walker v. Armstrong*, 21 B. 305; 4 W. R. 770; *In bonis Gullan*, 1 Sw. & T. 23; *Hobbs v. Knight*, 1 Curt. 768; *Bell v. Fothergill*, 2 P. & D. 148.

And this is the case, though the piece cut off may be carefully preserved with the will. *In bonis Simpson*, 5 Jur. N. S. 1366; *In re White*, 3 L. R. Ir. 417; *Bell v. Fothergill*, 2 P. & D. 148.

Obliterating or tearing off the names of the attesting witnesses is sufficient to revoke the will. *Tearing off names of witnesses.* *In bonis James*, 7 Jur. N. S. 52; *Abraham v. Joseph*, 5 Jur. N. S. 179; *Evans v. Dallow*, 31 L. J. P. 128.

Tearing off the name of one of the attesting witnesses would, no doubt, be sufficient to revoke the will. But the will is not revoked, if the name is carefully preserved with the will, and there is other evidence from the mode in which the piece cut off has been treated to rebut the presumption of revocation. *In bonis Wheeler*, 49 L. J. P. 29.

The destruction of signatures not necessary to the validity of the will, but recited in the attestation clause to have been made, is sufficient to revoke the will. *Tearing off signatures recited to have been made.* *Price v. Price*, 3 H. & N. 341; *Lumbell v. Lumbell*, 3 Hagg. 568; *Davies v. Davies*, 1 Ca. t. Lee 444; *Williams v. Tyley*, Johns. 530; *In bonis Harris*, 3 Sw. & T. 485.

Where portions of the will not necessary to its validity as a testamentary instrument are destroyed, the question is whether the portion destroyed is so important as to raise the presumption that the rest cannot have been intended *Destruction of portions of will.*

to stand without it, or whether it is unimportant and independent of the rest of the will. *Clarke v. Scripps*, 2 Rob. 563; *In re White*, 3 L. R. Ir. 413.

Thus, the destruction of a clause at the commencement of a will, or cutting out various legacies, will not revoke the rest. *In bonis Woodward*, 2 P. & D. 206; *In bonis Nelson*, 1 R. 6 Eq. 569.

On the other hand, where the middle pages only of a will were preserved, the whole was held to be revoked, though each page had been signed and attested. *In bonis Gullan*, 1 Sw. & T. 23; *Gullan v. Grove*, 26 B. 64, where the facts are badly stated.

A gift by deed of property disposed of by a prior will is not a revocation of the will, though it may make the will ineffectual. *Ford v. Da Pontes*, 30 B. 572.

Will in  
duplicate.

Where a will is executed in duplicate, one of which the testator retains while he deposits the other in the custody of another person, the destruction of the duplicate in the testator's possession revokes the whole. *Seymour's Case*, Com. Rep. 453; 1 P. W. 346; 2 Vern. 742; *Onions v. Tyrer*, 1 P. W. 346; *Burtenshaw v. Gilbert*, Cowp. 49; *Boughey v. Moreton*, 2 Cas. t. Lee, 532; 3 Hagg. 191; *Rickards v. Mumford*, 2 Phillim. 23; *Colvin v. Fraser*, 2 Hag. 266; see *Payne v. Trappes*, 1 Rob. 583.

Will not  
found.

A will or codicil left in the testator's possession and not forthcoming at his death must, in the absence of evidence to the contrary, be presumed to have been revoked. *Padmore v. Whatton*, 3 Sw. & T. 449; *In bonis Shaw*, 1 Sw. & T. 62; *Brown v. Brown*, 8 E. & B. 876; *Eckersley v. Platt*, 1 P. & D. 281; *Sugden v. Lord St. Leonards*, 1 P. D. 154.

But the contents of the will and the declarations of the testator down to his death are admissible in evidence for the purposes of rebutting this presumption. *Patten v. Poulten*, 6 W. R. 458; 1 Sw. & T. 55; *Battyl v. Lyles*, 22



Jur. 718; *Finch v. Finch*, 1 P. & D. 370; *Whiteley v. King*, 17 C. B. N. S. 756; *Sugden v. Lord St. Leonards*, 1 P. D. 154.

Where a will, shown not to have been revoked, cannot be found at the testator's death, evidence is admissible to prove its contents. *Brown v. Brown*, 8 E. & B. 876; *In bonis Barber*, 1 P. & D. 267; *Burls v. Burls*, *ib.* 472. <sup>Evidence of contents of lost will.</sup>

And for this purpose the declarations, written or oral, of the testator, made as well after as before the execution of the will, may be admitted. *Doe d. Shalcross v. Palmer*, 16 Q. B. 747; *Finch v. Finch*, 1 P. & D. 371; *Johnson v. Lyford*, *ib.* 546; *Sugden v. Lord St. Leonards*, 1 P. D. 154; see *Keen v. Keen*, 3 P. & D. 105. The case of *Quick v. Quick*, 3 Sw. & T. 442, is overruled.

The contents of the will may be established by the evidence of a single interested witness whose veracity and competency are unimpeached. *Sugden v. Lord St. Leonards*, 1 P. D. 154.

Where it is impossible to ascertain the whole contents of the will, effect will be given to such portions as can be ascertained. *Sugden v. Lord St. Leonards*, 1 P. D. 154; *Dickinson v. Stidolph*, 11 C. B. N. S. 341.

## CHAPTER VII.

## WILLS OF SOLDIERS AND SEAMEN.

**Soldiers and sailors excepted from Statute of Frauds as regards wills of movables.** THE Statute of Frauds (29 Car. II. c. 3), s. 23, provides that, notwithstanding that Act, any soldier being in actual military service, or any mariner or seaman being at sea, may dispose of his movables, wages, and personal estate as he or they might have done before the making of the Act.

**Exception continued by Wills Act.** The Wills Act (1 Vict. c. 26), s. 11, enacts that any soldier being in actual military service, or any mariner or seaman being at sea, may dispose of his personal estate as he might have done before the making of the Act.

**The Navy and Marines (Wills) Act, 1865.** By the Navy and Marines (Wills) Act, 1865 (28 & 29 Vict. c. 72), it is provided:—

**Short title.** 1. This Act may be cited as “The Navy and Marines (Wills) Act, 1865.”

**Interpretation of terms.** 2. In this Act—

The term “the Admiralty” means the Lord High Admiral of the United Kingdom, or the commissioners for executing the office of Lord High Admiral.

The term “seaman or marine” means a petty officer or seaman, non-commissioned officer of marines or marine, or other person forming part in any capacity of the complement of any of Her Majesty’s vessels, or otherwise belonging to Her Majesty’s naval or marine force, exclusive of commissioned, warrant, and subordinate officers, and assistant engineers, and of kroomen.

3. A will made after the commencement of this Act by any person at any time previously to his entering into service as a seaman or marine shall not be valid to pass any wages, prize money, bounty money, grant, or other allowance in the nature thereof, or other money payable by the Admiralty, or any effects or money in charge of the Admiralty.

Will made before entry ineffectual as to wages, &c.

4. A will made after the commencement of this Act by any person while serving as a seaman or marine shall not be valid for any purpose if it is written or contained on or in the same paper, parchment, or instrument with a power of attorney.

Will invalid if combined with power of attorney.

5. A will made after the commencement of this Act by any person while serving as a seaman or marine, or when he has ceased so to serve, shall not be valid to pass any wages, prize money, bounty money, grant, or other allowance in the nature thereof, or other money payable by the Admiralty, or any effects or money in charge of the Admiralty, unless it is made in conformity with the following provisions:—

Regulations for wills of seamen, &c., as to wages, &c.

- (1.) Every such will shall be in writing and be executed with the formalities required by the law of England in the case of persons not being soldiers in actual military service or mariners or seamen at sea :
- (2.) Where the will is made on board one of Her Majesty's ships, one of the two requisite attesting witnesses shall be a commissioned officer, chaplain, or warrant or subordinate officer belonging to Her Majesty's naval or marine or military force :
- (3.) Where the will is made elsewhere than on board one of Her Majesty's ships, one of the two requisite attesting witnesses shall be such a commissioned officer or chaplain or warrant or subordinate officer as aforesaid, or the governor, agent, phy-

sician, surgeon, assistant surgeon, or chaplain of a naval hospital at home or abroad, or a justice of the peace, or the incumbent, curate, or minister of a church or place of worship in the parish where the will is executed, or a British consular officer, or an officer of customs, or a notary public:

A will made in conformity with the foregoing provisions shall, as regards such wages, money, or effects, be deemed to be well made for the purpose of being admitted to probate in England; and the person taking out representation to the testator under such will shall exclusively be deemed the testator's representative with respect to such wages, money, or effects.

As to  
wills made  
by prison-  
ers of war.

6. Notwithstanding anything in this or any other Act, a will made after the commencement of this Act by a seaman or marine while he is a prisoner of war, shall (as far as regards the form thereof) be valid for all purposes if it is made in conformity with the following provisions:—

- (1.) If it is in writing and is signed by him, and his signature thereto is made or acknowledged by him in the presence of and is in his presence attested by one witness, being either a commissioned officer or chaplain belonging to Her Majesty's naval or marine or military force, or a warrant or subordinate officer of Her Majesty's Navy, or the agent of a naval hospital, or a notary public:
- (2.) If the will is made according to the forms required by the law of the place where it is made:
- (3.) If the will is in writing and executed with the formalities required by the law of England in the case of persons not being soldiers in actual military service or mariners or seamen at sea.

Payment  
under will  
not in con-

7. Notwithstanding anything in this Act, in case of a will made after the commencement of this Act by any

person while serving as a marine or seaman, and being <sup>formity with Act.</sup> either in actual military service or a mariner or seaman at sea, the Admiralty may pay or deliver any wages, prize money, bounty money, grant or other allowance in the nature thereof, or other money payable by the Admiralty, or any effects or money in charge of the Admiralty, to any person claiming to be entitled thereto under such will, though not made in conformity with the provisions of this Act, if, having regard to the special circumstances of the death of the testator, the Admiralty are of opinion that compliance with the requirements of this Act may be properly dispensed with.

8. This Act shall commence on such day, not later than <sup>Com-  
mence-  
ment of  
Act.</sup> the first day of January, one thousand eight hundred and sixty-six, as Her Majesty in Council thinks fit to direct; nevertheless Her Majesty in Council may, if it seems fit, with reference to any places out of the United Kingdom, direct that this Act do not commence there, respectively, until a time after that day, and with respect to every such place the time so appointed shall be deemed the time of commencement of this Act.

9. Every Order in Council under this Act shall be <sup>Publica-  
tion of  
Orders in  
Council.</sup> published in the *London Gazette*, and shall be laid before both Houses of Parliament within thirty days after the making thereof, if Parliament is then sitting, and if not, then within thirty days after the next meeting of Parliament.

It follows, therefore, that except in the cases mentioned in the Navy and Marines (Wills) Act, 1865, any soldier in actual military service, and any mariner or seaman being at sea, can make a testamentary disposition of his personalty in the manner allowed before the Statute of Frauds.

It is not proposed here to go into a full discussion of the old law. It may, however, be useful shortly to state

some of the more important points relating to the wills of these privileged persons.

**Infancy.** Such privileged persons may make wills disposing of their personal property, provided they have attained the age of fourteen. *In bonis Farquhar*, 4 N. of C. 651; *In bonis McMurdo*, 1 P. & D. 540; Swinburne, part ii., sec. 2, p. 75.

**Soldier defined.** The term soldier in section 11 of the Wills Act, includes an officer and a surgeon. *Drummond v. Parish*, 3 Curt. 522; *In bonis Hayes*, 2 Curt. 338; *In bonis Donaldson*, 2 Curt. 386.

**Military service.** The words "on actual military service" are equivalent to on an expedition.

Thus a will made by an officer while quartered at home or abroad in barracks is not within this section. *Drummond v. Parish*, 3 Curt. 522; *White v. Repton*, 3 ib. 818; *In bonis Phipps*, 2 ib. 368; *In bonis Johnson*, ib. 341; *In bonis Hill*, 1 Rob. 276; *Herbert v. Herbert*, D. & Sw. 10; see *In bonis Donaldson*, 2 Curt. 386.

**Mariner defined.** The term "mariner or seaman" includes a purser and a surgeon, and it seems the whole profession. *In bonis Hayes*, 2 Curt. 338; *In bonis Saunders*, 1 P. & D. 16.

It also includes persons serving in the merchant service. *In bonis Milligan*, 2 Rob. 108; *Morrell v. Morrell*, 1 Hag. 51; *In bonis Parker*, 2 Sw. & T. 375.

**"At sea."** The term "at sea" appears to be equivalent to "on maritime service," including the period while the testator is returning from such service. Thus wills made on board a vessel in a river, or in port, have been held valid within section 11. *In bonis Austen*, 2 Rob. 611; *In bonis Corby*, 18 Jur. 634; *In bonis Lay*, 2 Curt. 375; *Seymour's Case*, cit. 3 Curt. 530; *In bonis Saunders*, 1 P. & D. 16; *In bonis McMurdo*, ib. 540.

**Nuncupative wills.** The privileged persons above mentioned may make a nuncupative will, which will remain operative, though at

the time of their death they may not be on service, or at sea. *Morrell v. Morrell*, 1 Hag. 51; *In bonis Leese*, 17 Jur. 216; see, too, *Leman v. Bonsall*, 1 Add. 389.

They may make a will by any testamentary paper, whether in their handwriting or not, and whether signed by them or not, provided it can be shown that such paper was intended to take effect as the testator's last will. *Friswell v. Moore*, 3 Phillim. 135; *Constable v. Steibel*, 1 Hag. 56; *Macclae v. Ewing*, 1 Hag. 317; *Read v. Phillips*, 2 Phillim. 122; *Masterman v. Maberly*, 2 Hag. 235. See *Rymer v. Clarkson*, 1 Phillim. 22; *In bonis Cosser*, 1 Rob. 633; *Fulleck v. Atkinson*, 3 Hag. 527; *Wood v. Medley*, 1 Hag. 661.

The following rules must be understood as relating only to wills of personalty not within the Statute of Frauds or the Wills Act.

A will not found in the testator's possession cannot be established merely on proof of the testator's handwriting. Proof of hand-writing.

*Machin v. Grindell*, 2 Lee, 406; *Jameson v. Cooke*, 1 Hag. 82; *Crisp v. Walpole*, 2 Hag. 531; *Rutherford v. Maule*, 4 Hag. 213; *Bussell v. Marriott*, 1 Curt. 9; *Wood v. Goodlake*, 2 Curt. 82, 176; 2 Moo. P. C. 354, 436.

A will bearing an execution or attestation clause, but unexecuted or unattested, will be presumed not to have been finally adopted as the will of the testator. Will with attestation clause, but not attested. *Scott v. Rhodes*, 1 Phillim. 19; *Abbott v. Peters*, 4 Hag. 380; *Beaty v. Beaty*, 1 Add. 154; *Montefiore v. Montefiore*, 2 Add. 357; *Stewart v. Stewart*, 2 Moo. P. C. 193; *Bragg v. Dyer*, 3 Hag. 207.

Such presumption may be rebutted, if sufficient grounds can be shown for the omission to execute or attest it, such as ill health, or unavoidable accident, or if it appears that it was intended to take effect as the testator's will in the form in which it is found. *In bonis Taylor*, 1 Hag. 641; *L'Huille v. Wood*, 2 Cas. t. Lee, 22; *Lumkin v. Babb*, 1

Cas. t. Lee, 1; *Scott v. Rhodes*, 1 Phillim. 12; *Musterman v. Maberly*, 2 Hag. 247; *Hoby v. Hoby*, 1 Hag. 146; *Forbes v. Gordon*, 3 Phillim. 614; *Thomas v. Wall*, 3 Phillim. 23; *In bonis Lamb*, 4 N. of C. 561; *Buckle v. Buckle*, 3 Phillim. 323; *Allen v. Manning*, 2 Add. 490; *Harris v. Bedford*, 2 Phillim. 177.

Will including fealty.

Where the will includes property, which can only be given by a will executed with certain formalities, the same presumption arises that the will was intended to be executed with such formalities. *In bonis Herne*, 1 Hag. 222, 226; *Douglas v. Smith*, 3 Knapp, 1; *Elsden v. Elsdon*, 4 Hag. 183; *Gillow v. Burne*, 4 Hag. 291; *Reynolds v. White*, 2 Lee, 214; *Reeves v. Glover*, 2 Lee, 359.

It seems if the will includes realty, and the gift of the personalty is made dependent on the gift of the realty, probate of the will as regards the personalty would be refused as well. *Tudor v. Tudor*, 4 Hag. 199, n.

Temporary will.

A paper intended to be effectual, pending the preparation of a more formal document, will take effect as a will, if no formal document is executed. *Popple v. Cunison*, 1 Add. 377; *Forbes v. Gordon*, 3 Phillim. 614; *Hattatt v. Hattatt*, 4 Hag. 211.

Instructions for will.

Instructions for a will may take effect as a will, if the testator was prevented by death from executing a formal will. *Bone v. Spear*, 1 Phillim. 345; *Green v. Skipworth*, *ib.* 53; *Wood v. Wood*, *ib.* 357; *Huntington v. Huntington*, 2 *ib.* 213; *Sikes v. Snaith*, *ib.* 351; *Must v. Sutcliffe*, 3 *ib.* 104; *Nathan v. Morsee*, *ib.* 529; *Lewis v. Lewis*, *ib.* 109; *Allen v. Manning*, 2 Add. 490; *Goodman v. Goodman*, 2 Lee, 109; *Robinson v. Chamberlayne*, *ib.* 129; *Brown v. Farrant*, *ib.* 418; *Burrows v. Burrows*, 1 Hag. 109.

Where an interval intervenes between the preparation of instructions for a will and the death of the testator,



the instructions will take effect as a will only upon evidence that the testator adhered to them down to his death. *Bone v. Spear*, 1 Phillim. 345; *Devereux v. Bullock*, *ib.* 60, 72; *Sandford v. Vaughan*, *ib.* 48; *In bonis Herne*, 1 Hag. 222; *Barwick v. Mullings*, 2 Hag. 225; *Mitchell v. Mitchell*, *ib.* 74; *Dingle v. Dingle*, 4 *ib.* 388; *Reay v. Cowcher*, 2 *ib.* 249; *Antrobus v. Nepean*, 1 Add. 399; *Monroe v. Coutts*, 1 Dow. 437; *Matthews v. Warner*, 4 Ves. 186; *Torre v. Castle*, 2 Moo. P. C. 133.

An unexecuted paper, containing only a partial disposition of the testator's property, will not take effect as a will, unless it be shown to contain the final intention of the testator as far as it goes. *Montefiore v. Montefiore*, 2 Add. 354; *Cundy v. Medley*, 1 Hag. 140; *Maclae v. Ewing*, *ib.* 317; *In bonis Wenlock*, *ib.* 551; *In bonis Robinson*, *ib.* 643; *Devereux v. Bullock*, 1 Phillim. 60; *Sandford v. Vaughan*, *ib.* 48; *Theakston v. Marson*, 4 Hag. 290; *Bayle v. Mayne*, 3 Phillim. 504.

Alterations in the will of a soldier, which was made while on actual military service, will be presumed to have been made during the continuance of such service. *In bonis Tweedale*, 3 P. & D. 204.

A charge of legacies on real estate contained in a will duly executed to affect realty will include legacies given by a subsequent unattested will when the testator is one of the persons competent to dispose of his personalty by such will. *Buckeridge v. Ingram*, 2 Ves. J. 652; *Sheddon v. Godrich*, 8 Ves. 481; *Wilkinson v. Adam*, 1 V. & B. 445; *Swift v. Nash*, 2 Kee. 20; see *Rose v. Cunynghame*, 12 Ves. 29.

Legacies charged upon real estate as an auxiliary fund may be revoked by a subsequent valid will, though not executed so as to affect realty. *Brudenell v. Boughton*, 2 Atk. 68; *A.-G. v. Ward*, 3 Ves. 327.

Legacies charged only upon real estate cannot be re-

voked by a subsequent valid will not executed so as to affect realty. *Beckett v. Harden*, 4 Mau. & S. 1; *Locke v. James*, 11 M. & W. 901; see *Mortimer v. West*, 2 Sim. 274; *Fitzgerald v. Field*, 1 Russ. 428.

Legacies given out of a mixed fund of realty and personalty can be revoked by a valid will not executed to affect realty only so far as they are payable out of the personalty. *Stocker v. Harbin*, 3 B. 479.

A valid will of personalty not executed to affect realty may dispose of any portion of the personalty free from legacies, though the effect may be to increase a charge of legacies on realty contained in a prior will effectually disposing of real estate. *Coxe v. Bassett*, 3 Ves. 155.

Revoca-  
tion by  
marriage  
and birth  
of children.

The marriage of a privileged testator or the birth of a child subsequent to the date of the will will not alone revoke the will. *Doe v. Barford*, 4 M. & S. 10; *Wellington v. Wellington*, 4 Burr. 2171; *Wells v. Wilson*, 5 T. R. 52, note; *Jackson v. Hurlock*, Amb. 495.

But the birth of children alone after the date of the will affords a presumption against the will. *Johnston v. Johnston*, 1 Phillim. 447.

A privileged will is revoked by the subsequent marriage of the testator and the birth of children, unless the wife and children are provided for by the will or by a previous settlement. *Overbury v. Overbury*, 2 Stow, 242; see 1 Phillim. 479; *Kenebel v. Scrafton*, 2 East, 530; *Doe v. Lancashire*, 5 T. R. 49 (posthumous child).

Marriage  
of  
widower.

The same rule applies to the case of a widower who marries a second time and has children, though the will may be in favour of children by the first marriage. *Christopher v. Christopher*, Dick. 445; *Holloway v. Clarke*, 1 Phillim. 339; *Walker v. Walker*, 2 Curt. 854.

It appears to be unsettled whether the birth of children by a first wife after the date of the will and marriage to a second wife revokes the will. *Gibbons v. Caunt*, 4 Ves. 848.

The will is not revoked where it does not dispose of all the testator's estate. See *Kenebel v. Scrafton*, 2 East, 541; *Marston v. Roe d. Fox*, 8 Ad. & E. 57; *Brady v. Cubitt*, Dougl. 40; *Doe v. Edlin*, 4 A. & P. 587.

Provision made for the wife alone by a settlement or by the will itself will not prevent its revocation. *Marston v. Roe d. Fox*, 8 A. & E. 14; 2 Nev. & P. 504. Provision for wife.

Provision by a settlement subsequent to the will will not prevent revocation. *Israell v. Rodon*, 2 Moo. P. C. 51; see *Talbot v. Talbot*, 1 Hag. 705; *Ex parte Ilchester*, 7 Ves. 348; *Johnson v. Wells*, 2 Hag. 561; *In bonis Cudyard*, 1 Sw. & T. 34.

The will is not revoked where such revocation would not benefit the afterborn children. *Sheath v. York*, 1 V. & B. 390.

The fact that the wife and children predecease the testator will not revive the revoked will. *Helyar v. Helyar*, 1 Phillim. 413; *Sullivan v. Sullivan*, *ib.* 343; *Emerson v. Boville*, *ib.* 342, overruling *Wright v. Netherwood*, 2 Salk. 593, n., 2 Phillim. 266, n.

In the case of privileged wills it seems clear that a will, though revoked by marriage and birth of children, may be set up again by evidence of intention to adhere to it, such wills being free from the operation of the Statute of Frauds and Wills Act. See *Marston v. Roe*, 8 A. & E. 14; *Gibbens v. Cross*, 2 Add. 455; *Fox v. Marston*, 1 Curt. 494; *Israell v. Rodon*, 2 Moo. P. C. 51; *Matson v. Magrath*, 1 Rob. 680; *Tapster v. Holtzappfell*, 5 N. of C. 554.

## CHAPTER VIII.

## REVIVAL OF WILLS—INCORPORATION.

No will  
revoked  
to be  
revived  
otherwise  
than by  
re-execu-  
tion, or a  
codicil to  
revive it.

THE Wills Act (1 Vict. c. 26), section 22, enacts, that no will or codicil, or any part thereof which shall be in any manner revoked, shall be revived, otherwise than by the re-execution thereof, or by a codicil executed in manner thereinbefore required, and showing an intention to revive the same; and when any will or codicil which shall be partly revoked and afterwards wholly revoked shall be revived, such revival shall not extend to so much thereof as shall have been revoked before the revocation of the whole thereof, unless an intention to the contrary shall be shown.

Revoca-  
tion of  
revoking  
will.

Where a testamentary disposition is revoked by a subsequent disposition, which latter is in its turn revoked, the former disposition is not thereby revived. *Burtenshaw v. Gilbert*, Cowp. 49; *In bonis Brown*, 1 Sw. & T. 32; *Brown v. Brown*, 8 E. & B. 876; *Wood v. Wood*, 1 P. & D. 309.

Revival  
by codicil.

It has recently been doubted, whether since the Wills Act a codicil, described as a codicil to a will of a particular date which has been revoked, would be sufficient to revive the revoked will in the absence of any additional evidence of "intention to revive the same." *In bonis Steele*, 1 P. & D. 575.

There is an obvious distinction between a codicil incorporating and giving effect to earlier unattested instruments, for which purpose a mere reference is sufficient, and a codicil reviving a revoked instrument.

There are, however, cases in which a codicil described as a codicil to a particular will which had been revoked by marriage, there being no other will in existence, has been held sufficient to revive the revoked will. *In bonis Chapman*, 1 Rob. 1; *Payne v. Trappes*, 1 Rob. 583.

This was clearly the rule before the Wills Act. *Lord Walpole v. Earl of Orford*, 3 Ves. 402; S. C. 7 T. R. 138.

In the case of *Neate v. Pickard*, 2 N. of C. 406, and in *The goods of Reynolds*, 3 P. & D. 35, there appear to have been express words of confirmation.

It seems a codicil, described as a codicil to a will of a particular date, though the codicil is directed to take effect only in events which do not happen, may have the effect of reviving the will. *In bonis Da Silva*, 2 Sw. & T. 315; see *Parsons v. Lanoe*, 1 Ves. Sen. 190.

If there are two wills, the latter of which revokes the earlier, it seems a codicil described as a codicil to the testator's last will, but giving the date of the revoked will, will not revive that will or revoke the second will. *In bonis May*, 1 P. & D. 581; *In bonis Ince*, 2 P. & D. 111. These cases may very well be supported on the ground that the description of the will by the codicil was ambiguous, the will of the date mentioned not being the last will of the testator, or, in fact, his will at all, as it had been revoked.

In *In bonis Anderson*, 39 L. J. P. 55, the principle applied was the same. In that case the codicil was expressed to be a codicil to the testator's last will, but confirmed a will by date which had been revoked.

In *In bonis Wilson*, 1 P. & D. 582, the codicil, though referring to a revoked will by date, went on to refer to certain bequests as contained in that will, which were, in fact, contained in a later will. There was, therefore, a clear case of mistaken description.

A testamentary disposition, written at the foot of a will revoked by marriage, and referring to a bequest contained

Contingent codicil.

Codicil referring to will revoked by later will.

Writing on the will referring to

**its contents.** in the will, though not referring to the will in terms or described as a codicil, is sufficient to revive the will. *In bonis Terrible*, 2 Sw. & T. 8.

**Codicil attached to revoked will.** The fact that a codicil is found attached by tape to a will which has been revoked by a later will will not revive the revoked will. *Marsh v. Marsh*, 1 Sw. & T. 528.

**Destroyed will.** A will which has been destroyed and no longer exists in writing cannot be revived by a codicil, though there may be a draft of the will in existence. *Hale v. Tokelove*, 2 Rob. 318; *Newton v. Newton*, 12 Ir. Ch. 118; *Rogers v. Goodenough*, 2 Sw. & T. 342.

**Confirmation of will altered by codicil.** A codicil making an alteration in a will, and confirming it in all other respects, does not revive the will so far as it has been altered by intermediate codicils. *Crosbie v. Macdonald*, 4 Ves. 610; *Green v. Tribe*, 9 Ch. D. 231.

**Incorporation of documents.** Any document in existence when the will is executed, and sufficiently described to enable it to be identified, may be incorporated with the will, and may be referred to for purposes of construction, whether incorporated in the probate or not. *Hutchings v. Wood*, 2 Moo. P. C. 355; *Aaron v. Aaron*, 3 De G. & S. 475; *In bonis Sunderland*, 1 P. & D. 198; *In bonis Mercer*, 2 P. & D. 91; see *In bonis Pascall*, 1 P. & D. 606; *In bonis Gill*, 2 P. & D. 6; *Quihampton v. Going*, 24 W. R. 917.

**Whether document must be described as existing.** It has been said that the document must not only be in fact in existence when the will is executed, but also that it must be described as existing. *Van Straubenzer v. Monk*, 3 Sw. & T. 6; *In bonis Watkins*, 1 P. & D. 19; *In bonis Dallow*, *ib.* 189; *In bonis Sunderland*, *ib.* 198.

It would seem, however, that if the document is proved to have been in existence at the date of the will, and is sufficiently identified by the description in the will, it is not necessary that it should be actually described as existing. See *Singleton v. Tomlinson*, 3 App. C. 404.

It seems that a document sufficiently referred to in the will, though not in existence, may be incorporated if it exists at the date of a codicil to the will. *In bonis Hunt*, 2 Rob. 622; *In bonis Stewart*, 32 L. J. P. 94; 3 Sw. & T. 192; 4 Sw. & T. 211; *In bonis Lady Truro*, 1 P. & D. 201, not following *In bonis Mathias*, 32 L. J. P. 115; 3 Sw. & T. 100.

Incorporation of documents in existence at date of codicil.

But for this purpose it must be clear that the will, if read as of the date of the codicil, refers to a definite instrument, and that the instrument in question satisfies the description in the will.

Thus, a codicil confirming a will, which directs certain property to be distributed as the testator may by any memorandum or deed direct, will not have the effect of incorporating memoranda executed between the dates of the will and codicil. *In bonis Lancaster*, 29 L. J. P. 155; see *In bonis Warner*, 10 W. R. 566.

A memorandum not described as a codicil written on the back or the fourth side of a paper containing an invalid will to which it does not refer does not incorporate the will. *In bonis Drummond*, 2 Sw. & T. 8; *In bonis Tovey*, 47 L. J. P. 63; see *In bonis Willmott*, 1 Sw. & T. 36.

Memorandum on back of will.

So a reference to executors "hereunder named," or the words "turn over," will not incorporate a clause not contained in the body of the will, though written before execution. *In bonis Dallow*, 1 P. & D. 189; *In bonis Dearle*, 39 L. T. N. S. 93; see *In bonis Watkins*, 1 P. & D. 19.

On the other hand, the words "see over," with an asterisk, have been held sufficient to incorporate a sentence on the second side of a sheet of paper, by the side of which was also written "see over," with an asterisk. *In bonis Birt*, 2 P. & D. 214.

The cases above cited on the subject of revival are also authorities on the subject of incorporation.

Memo-  
randum  
referring  
to contents  
of will.

Thus it would seem that a memorandum at the foot of a will, referring to something contained in the will, would incorporate it, though there is no express reference to the will as such. *In bonis Terrible*, 2 Sw. & T. 8; *In bonis Widdrington*, 35 L. J. P. 66.

Upon similar principles it has been held that a testamentary disposition not described as a codicil, but written on the back of the will underneath two codicils described as codicils to the will, and altering a provision contained in the second codicil, had the effect of republishing the will and codicils. *Guest v. Willasey*, 2 Bing. 429; 3 Bing. 614.

Reference  
to a will in  
a codicil  
incor-  
porates an  
unattested  
will.

A reference by a duly attested codicil to a will incorporates the will, if there is only one document in existence to which the term "will" can apply. *Barnes v. Crowe*, 1 Ves. Jr. 485; *Doe d. Williams v. Evans*, 1 Cr. & Mee. 42; *Allen v. Maddock*, 11 Moo. P. C. 427; *In bonis Heathcote*, 29 W. R. 356.

Reference  
to un-  
attested  
codicil.

Similarly, a reference in a codicil to a prior unattested codicil will incorporate it. *Ingoldby v. Ingoldby*, 4 N. of C. 493; *Smith's case*, 2 Curt. 796.

Reference  
to will  
where  
there is a  
valid will  
and codi-  
cils.

A reference, however, in a codicil to a will and prior codicils, where there is a will and codicils duly attested, will not incorporate a codicil not duly attested. *Croker v. Marquis of Hertford*, 3 Curt. 468; 4 Moo. P. C. 339.

Reference  
to will  
where  
there is a  
valid will  
and un-  
attested  
codicils.

And upon the same principle it would seem that a reference by a codicil to a will where there is a duly attested will and some unattested codicils will not set up the unattested codicils. *Utterton v. Robins*, 1 Ad. & E. 423; 2 Nev. & M. 821; *In the goods of Phelps*, 6 N. of C. 695; *Haynes v. Hill*, 7 N. of C. 256; see, however, *Radburn v. Jervis*, 3 B. 450; *Guest v. Willasey*, 2 Bing. 429; 3 Bing. 614.

Will may  
include  
will and  
codicils.

Possibly a reference to a will in general terms would incorporate all the valid instruments constituting the will, such as a will and several codicils.



A codicil referring to a will by date incorporates the will of that date only, and not subsequent codicils. Reference to will by date. *Burton v. Newbery*, 1 Ch. D. 234; *In bonis Reynolds*, 3 P. & D. 35.

The case is not altered by the fact that a valid codicil referring to the will by date is written on the same paper as a valid will and an intermediate unattested codicil. *In bonis Hutton*, 5 N. of C. 598; *In bonis Phelps*, 6 ib. 695; *In bonis Willmott*, 1 Sw. & T. 36; *In re Spotten*, 5 L. R. Ir. 403.

Perhaps where a codicil is directed to be taken as part of the will, a subsequent codicil referring to the will by date and confirming it will have the effect of confirming the codicil as well. See *Gordon v. Lord Reay*, 5 Sim. 274, disapproved in *Burton v. Newbery*, *supra*.

If the codicil recites the will by date and a codicil by date, and then confirms the "said will," the term "will" may include both will and codicil. *Aaron v. Aaron*, 3 De G. & S. 475.

As to whether a codicil headed "This is a fourth codicil to my will" would incorporate a codicil headed "This is a third codicil to my will," see *Stockil v. Punshon*, 6 P. D. 9.

Incorporation of an instrument into a will does not alter the effect of the instrument so far as it is already valid. Effect of incorporation. So far as it is invalid as an independent instrument it takes effect as a testamentary disposition, subject to the ordinary rules as to lapse, ademption, &c., applicable to wills. *Bizzey v. Flight*, 3 Ch. D. 269.

A paper not in existence at the date of the execution of a testamentary instrument cannot be incorporated in it or referred to for purposes of construction. Paper not in existence cannot be incorporated. *Countess Ferraris v. Lord Hertford*, 3 Curt. 468; *In bonis Watkins*, 1 P. & D. 19; *In bonis Dallow*, ib. 189; *Singleton v. Tomlinson*, 3 App. C. 404; *Smith v. Conder*, 9 Ch. D. 170.

Where a gift is made by will to a person, and it appears Gift on

trusts  
declared  
by parol  
to the  
trustee.

on the face of the will that the gift is to be held on trust, but the trusts are not declared, oral evidence of the trusts is admissible if they have been communicated to the legatee prior to the execution of the will. *Crook v. Brooking*, 2 Vern. 50, 106; *Pring v. Pring*, 2 Vern. 98; *Irvine v. Sullivan*, 8 Fq. 673; *Riordan v. Banon*, I. R. 10 Eq. 469; *In re Fleetwood*; *Sidgreaves v. Brewer*, 49 L. J. Ch. 514.

Power  
cannot be  
reserved  
by will of  
making a  
subsequent  
unattested  
will.

A testator cannot reserve by his will the power of making a testamentary disposition of his property by a subsequent unattested paper. *Habergham v. Vincent*, 2 Ves. Jr. 204; 4 B. C. C. 353; *Countess de Zichy Ferraris v. Marquis of Hertford*, 3 Curt. 468; 4 Moo. P. C. 339.

Thus, a gift to trustees to hold upon the uses appointed by a letter to be signed by the testator is invalid. *Johnson v. Bull*, 5 De G. & S. 85.

Persons  
to take  
under a  
particular  
description  
may de-  
pend on a  
subsequent  
act of the  
testator.

But there is no objection to a gift to persons to be ascertained by a subsequent act on the part of the testator, provided the act is one which must be done as the natural result of the state of the property at the date of the will, and is in no way dependent upon a power reserved by the will. *Stubbs v. Sargon*, 2 Kee. 255; 3 M. & Cr. 507, where the gift was to the persons who should be in co-partnership with the testatrix at the time of her decease, or to whom she should have disposed of her business.

Gift on  
trust;  
trust dis-  
closed  
later.

It has been said that where the will discloses that a bequest is made to a person as a trustee, but the nature of the trusts is not disclosed, evidence of the trusts is admissible, if they have been communicated to the legatee after the execution of the will. See *Moss v. Cooper*, 1 J. & H. 352; *Riordan v. Banon*, I. R. 10 Eq. 469; *In re Fleetwood*; *Sidgreaves v. Brewer*, 49 L. J. Ch. 514; 15 Ch. D. 594, where *Johnson v. Bull*, 5 D. G. & S. 85, which is an authority to the contrary, is discussed.

The distinction between this class of cases and those

mentioned below, where an absolute bequest is made upon a secret trust accepted by the legatee, though fine is real.

In the latter cases the legatee would be enabled to commit a fraud if evidence of the trust were not admitted. In the former cases he is a trustee upon the face of the will, and cannot therefore in any case take beneficially.

Where a gift is made in absolute terms, but the testator before or after the date of his will communicates to the legatees his intention that they are to hold the gift in trust, and they either accept the trust or acquiesce in it by silence, evidence of the trust is admissible. *Moss v. Cooper*, 1 J. & H. 352. Secret trust.

Where a gift is made to A. and B. on the faith of a promise by A., given before the gift is made, to apply it to certain trusts, the trust is fastened on to the gift to both, though B. may not have been aware of the trust, on the principle that no one can take advantage of a gift procured by fraud. *Russell v. Jackson*, 10 H. 204. Gift procured by promise to hold it in trust.

Where a gift is made to A. and B. as tenants in common, the intention being to create a trust which is subsequently communicated to A. but not to B., the gift to A. only is fixed with the trust. *Tee v. Ferris*, 2 K. & J. 357; *Rowbotham v. Dunnnett*, 8 Ch. D. 430. Gift to persons who subsequently accept trust.

If the gift is made to joint tenants, and the trust is subsequently disclosed to and accepted by one of them only, it seems the trust is fastened upon the whole gift. See *Jones v. Badley*, 3 Eq. 635; *Rowbotham v. Dunnnett*, 8 Ch. D. 430.

In cases of secret trust the intention to create a trust must be clearly established. *Jones v. Badley*, 3 Ch. 362; *McCormick v. Grogan*, L. R. 4 H. L. 82.

## CHAPTER IX.

## PROBATE AND ITS EFFECT.

**What may be proved.** EVERY instrument containing a testamentary disposition of personal property, or affecting a prior testamentary disposition, is entitled to probate if properly executed and attested. *In bonis Durance*, 2 P. & D. 406.

**Instrument appointing executor.** A testamentary instrument appointing an executor is entitled to probate, though the executor renounces probate. *O'Dwyer v. Geare*, 1 Sw. & T. 465; 29 L. J. P. 47; *In bonis Lancaster*, 1 Sw. & T. 464; *In bonis Jordan*, 1 P. & D. 555.

**Contingent will.** A will to take effect upon a contingency is not admissible to probate for any purpose if the contingency does not happen, and is inoperative to revoke a previous will. *In bonis Hugo*, 2 P. D. 72.

**Contingent codicil.** But the principle does not apply to a codicil which will be admitted to probate, even if it is conditional and contains a declaration that it is not to be proved unless the condition is fulfilled, as it may have the effect of republishing the will. *In bonis Da Silva*, 2 Sw. & T. 315; *In bonis Colley*, 3 L. R. Ir. 243.

**Instrument appointing guardians.** An instrument appointing guardians merely is not entitled to probate. *In bonis Morton*, 33 L. J. P. 87.

**Wills of married women.** In the case of wills of married women, if the will is tendered for probate on the ground that it disposes of separate estate, the Probate Division should decide whether there was any separate estate, and grant or refuse probate accordingly. *In bonis Tharp*, 3 P. D. 76.

In the case of a will made by a married woman under a power, if all the persons interested are before the Court, the Probate Division should decide whether there was a power, and also whether it has been executed. *In bonis Tharp*, 3 P. D. 76.

A will disposing of real estate only, though the real estate may be directed to be converted and debts and legacies may be directed to be paid, is not entitled to probate. *In bonis Drummond*, 2 Sw. & T. 118; *In bonis Bootle*, 3 P. & D. 177. Will of  
realty.

But a will disposing of realty only is entitled to probate if the testator appoints an executor. *In bonis Jordan*, 1 P. & D. 555; *In bonis Miskelly*, I. R. 4 Eq. 62.

The will of a married woman made in pursuance of a power, and taking effect only upon real estate, is not entitled to probate where the married woman survives the coverture without republishing the will, though an executor may be appointed. *O'Dwyer v. Geare*, 1 Sw. & T. 465. *In bonis Barden*, 1 P. & D. 325, must be supported on this ground if at all.

Where a testator makes two wills not referring to each other, one of property in England and the other of property abroad, and appoints different executors, the foreign will is not entitled to probate. *In bonis Cood*, 1 P. & D. 449. Foreign  
will.

A foreign probate will not affect personal property in England, but a duly authenticated copy of a will proved in a foreign country will be admitted to probate in England without further evidence of the validity of the will. *In bonis Smith*, 16 W. R. 1130; *In bonis Earl*, 1 P. & D. 450; *In bonis Hill*, 2 P. & D. 89; *Miller v. James*, 3 P. & D. 5; *In bonis Rule*, 4 P. D. 76: see *In bonis Prince Henry the 69th*, 49 L. J. P. 67; *In bonis Dost Aly Khan*, 6 P. D. 6. Foreign  
probate.

As to Scotch confirmations, see 21 & 22 Vict. c. 56, ss. 12,

16; *In bonis Ryde*, 2 P. & D. 86; *Hood v. Lord Barrington*, 6 Eq. 218; *In bonis Ewing*, 50 L. J. T. 11.

As to Irish probates, see 20 & 21 Vict. c. 79, s. 95.

Whether  
incorporated  
document  
should be  
included in  
probate.

The question whether documents not in themselves of a testamentary character but incorporated with the will should be included in the probate is mainly one of convenience.

If the document is valid in itself independently of the will, it would seem that it need not be included in the probate, if there is a difficulty in procuring its production. *Sheldon v. Sheldon*, 1 Rob. 81; *In bonis Sibthorp*, 1 P. & D. 106.

If the document derives its validity from the will it ought, as a general rule, to be included in the probate. *Sheldon v. Sheldon*, *supra*.

If the document incorporated with the will is itself testamentary it should be included in the probate.

Thus, where an English will refers to and incorporates a foreign will the foreign will must be included in the probate, though the executors of the English will may have nothing to do with the property disposed of by the foreign will. *In bonis Harris*, 2 P. & D. 83; *In bonis Lord Howden*, 43 L. J. P. 26.

On the other hand, where the English will, though confirming a foreign will, expressly declares that the English will is to take effect independently of the foreign will, the latter need not be included in the probate. *In bonis Astor*, 1 P. D. 150.

Where  
will must  
be proved.

Probate of a will must be applied for in the Probate Division, and no proceedings can be taken under a will of personal property till the will has been proved, unless, perhaps, probate is alleged and admitted on the pleadings. *Pinney v. Hunt*, 6 Ch. D. 98.

Probate,  
how far  
evidence

By 20 & 21 Vict. c. 77, s. 62, it is provided that where the will is proved in solemn form, or its validity declared

in a contentious matter, the probate shall be conclusive evidence of the validity and contents of the will in all proceedings affecting real estate. as to  
realty.

Section 64 provides in effect that if probate of a will not proved in solemn form is intended to be used in an action as evidence of a testamentary disposition affecting realty, ten days' notice before the trial of the intention to use the probate as evidence may be given; and if the opposite party does not, within four days after receiving such notice, give notice that he disputes the validity of the will, the probate will be *prima facie* evidence of the will, its validity and contents. *Barraclough v. Greenhough*, L. R. 2 Q. B. 612.

Where the will has not been proved there can be no doubt that an action will lie in the Chancery Division to establish it, so far as it relates to real estate. For the old practice on this subject, see a valuable note in Mr. Dunning's Concise Precedents, p. 510, *et seq.* Action  
to establish  
will of  
real estate.

Probate is conclusive upon the question whether the will does or does not express the true will of the testator. Chancery  
Division  
will not  
set aside  
will for  
fraud of  
legatee.

If the whole or any part of a will is procured by fraud the objection must be taken when probate is applied for.

After probate of a will has been granted no proceedings can be taken in the Chancery Division to have the legatee of the whole or any part of the property bequeathed declared a trustee on the ground of fraud. *Allen v. M'Pherson*, 1 H. L. 191; *Meluish v. Milton*, 3 Ch. D. 27.

It would seem that the same principle would apply even in such a case as that already cited of *Mitchell v. Gard*, 3 Sw. & T. 75, *supra*, p. 22; and see *Betts v. Doughty*, 5 P. D. 26; *In re Birchall*; *Wilson v. Birchall*, 29 W. R. 461.

## CHAPTER X.

## WHAT PROPERTY MAY BE DISPOSED OF BY WILL.

1 Vict.  
c. 26, s. 3.

All pro-  
perty may  
be disposed  
of by will;

comprising  
customary  
freeholds  
and copy-  
holds with-  
out surren-  
der and  
before ad-  
mittance;  
also such  
of them as  
could not  
be devised  
before the  
Act;

estates  
*pur autre  
vie*;

By the third section of the Wills Act, it is enacted that every person may, by his will, bequeath or dispose of "all real estate and all personal estate which he shall be entitled to, either at law or in equity, at the time of his death, and which, if not so devised, bequeathed or disposed of, would devolve upon the heir-at-law, or customary heir of him, or, if he became entitled by descent, of his ancestor, or upon his executor or administrator; and that the power thereby given shall extend to all real estate of the nature of customary freehold or tenant right, or customary or copyhold, notwithstanding that the testator may not have surrendered the same to the use of his will, or notwithstanding that, being entitled as heir, devisee or otherwise to be admitted thereto, he shall not have been admitted thereto, or notwithstanding that the same, in consequence of the want of a custom to devise or surrender to the use of a will or otherwise, could not at law have been disposed of by will if this Act had not been made, or notwithstanding that the same, in consequence of there being a custom that a will or a surrender to the use of a will should continue in force for a limited time only, or any other special custom, could not have been disposed of by will according to the power contained in this Act, if this Act had not been made; and also to estates *pur autre vie*, whether there shall or shall not be any special occupant thereof, and whether the same shall be freehold, customary freehold, tenant right, customary or copyhold, or of any



other tenure, and whether the same shall be a corporeal or an incorporeal hereditament; and also to all contingent, executory, or other future interests in any real or personal estate, whether the testator may or may not be ascertained as the person or one of the persons in whom the same respectively may become vested, and whether he may be entitled thereto under the instrument by which the same respectively were created, or under any disposition thereof by deed or will; and also to all rights of entry for conditions broken, and other rights of entry; and also to such of the same estates, interests, and rights respectively, and other real and personal estate, as the testator may be entitled to at the time of his death, notwithstanding that he may become entitled to the same subsequently to the execution of his will."

The effect of this section as regards copyholds is to enable the copyholder to devise his estate without a surrender. Until the devisee is admitted the customary estate descends to the heir. Though the lord will not be compelled to admit the heir if there is a devisee, he cannot seize because the devisee refuses to be admitted if the heir is willing to come in. *R. v. Garland*, L. R. 5 Q. B. 269; *Garland v. Mead*, *ib.* 6 Q. B. 441; see *Allen v. Bewsey*, 7 Ch. D. 453.

It has been suggested that lands of a testator dying without heirs which would therefore not devolve upon "the heir-at-law of him," but would escheat to the lord, are not within this section, and therefore that a will disposing of lands in such a case must be executed with the formalities required by the Statute of Frauds. Williams' Real Prop., 9th ed., p. 121, note; Dunning's Concise Prec., p. 3.

It appears to be doubtful whether an estate *pur autre vie* limited to a man and the heirs of his body could be disposed of before the Wills Act, if the entail had not been barred. The better opinion seems to be that it could

contingent interests;

rights of entry;

and property acquired after execution of will.

Devise of copyholds.

Lands liable to escheat.

Whether an estate *pur autre vie* to a man and the heirs

of his body not; see *Campbell v. Sandys*, 1 Sch. & Lef. 294; *Hopkins v. Ramage*, Batty, 365; *Blake v. Luxton*, Coop. 185; *Allen v. Allen*, 2 Dr. & War. 307, 326; and see *Doe v. Luxton*, 6 T. R. 298; see 1 Jarman, 56.

The Wills Act apparently leaves the point where it was, since sec. 3, which makes devisable all real estate which if not devised would devolve upon the heir-at-law, or customary heir, or upon his executor or administrator, does not in terms extend to real estate, which would descend to the heir special, if not devised.

Title by possession is devisable. A person in possession of land without other title has a devisable interest. *Asher v. Whitlock*, L. R. 1 Q. B. 1; *Clarke v. Clarke*, I. R. 2 C. L. 395; see *Gresley v. Mousley*, 4 De G. & J. 78.

But not the right to sue in testator's name. The third section does not make any kind of personalty bequeathable which could not be bequeathed before; thus a testator cannot bequeath a promissory note made to him so as to pass the right to sue on it, which remains in the executor. *Bishop v. Curtis*, 18 Q. B. 879.

Property held in joint tenancy. Property held by the testator in joint tenancy survives to the other joint tenants and cannot be given by will; thus, for instance, property transferred by the testator into the joint names of himself and his wife where there is nothing to rebut the presumption of advancement cannot be given by will, whether by specific gift or otherwise. *Dummer v. Pitcher*, 2 M. & K. 262; *Coates v. Stevens*, 1 Y. & C. Ex. 66; *Grosvenor v. Durston*, 25 B. 97; *Turner v. A.-G.*, I. R. 10 Eq. 386.

Power to arise upon a contingency. A general power to an ascertained person to appoint the use in lands, where the power is to arise only upon a certain contingency, could always be executed before the contingency happened. *Dalby v. Pullen*, 2 Bing. 144; 9 J. B. Moore, 300; *Logan v. Bell*, 1 C. B. 872.

Power to contingent person. Prior to the Wills Act it was held that a general power to appoint property operating upon the legal estate given

to the survivor of two persons could not be exercised till the survivor was ascertained. *Doe v. Tomkinson*, 2 Mau. S. 165. over the legal estate.

This doctrine, however, had no application to equitable estates, and is apparently abolished by the Wills Act. *Thomas v. Jones*, 1 D. J. & S. 63.

A power to be exercised by an instrument in writing could always be exercised by will. *Lisle v. Lisle*, 1 B. C. C. 533. Power to be exercised in writing.

A general power to appoint by deed or instrument, sealed and delivered before a certain period, cannot be exercised by a will which does not take effect till after the period. *Cooper v. Martin*, 3 Ch. 47.

A power to appoint by will to A. and others may be exercised after A.'s death. *Paske v. Haselfoot*, 2 N. R. 568; 33 B. 125.

Where a power of disposition over property is given to a person, the power may be exercised by deed or will, and will not be cut down to a testamentary power without clear words. Power of disposition not cut down to testamentary power.

Thus a gift to A. for life, with a power to dispose of the property then or at or after his decease, gives A. a power exercisable by deed or will. *Anon.*, 3 Leon. 71, pl. 108; *Ex parte Williams*, 1 J. & W. 89; *Tomlinson v. Dighton*, 1 P. W. 149; 1 Com. 194; *In re David's Trusts*, Jo. 495; *In re Mortlock's Trusts*, 3 K. & J. 456; *Humble v. Bowman*, 47 L. J. Ch. 62; *In re Jackson's Will*, 13 Ch. D. 189; see, too, *Sinnot v. Walsh*, 5 L. R. Ir. 27. The cases of *Kennedy v. Kingston*, 2 J. & W. 431; *Reid v. Reid*, 25 B. 469; and *Freeland v. Pearson*, 3 Eq. 658, may be considered overruled.

On the other hand, if any words are used which would be appropriate only to a testamentary gift, such as leave or bequeath, the power can only be exercised by will. *Doe v. Thorley*, 10 East. 438; *Walsh*

v. *Wallinger*, 2 R. & M. 78; *Paul v. Hewetson*, 2 M. & K. 434.

Possibly, if the tenant for life is restrained from alienation, a power at her decease to dispose of property might be construed as testamentary only. *Archibald v. Wright*, 9 Sim. 161.

Under a gift to A. for life, with power to dispose of the property for her own use, with a gift over "in the event of her decease, should there be anything then remaining," the tenant for life has no power of disposition by will. *In re Thomson's Estate*; *Herring v. Barrow*, 13 Ch. D. 144; 14 Ch. D. 263.

A power to be exercised by an instrument in writing executed with certain formalities is exercisable by will executed with those formalities. *Kibbet v. Lee*, Hob. 312; *Smith v. Adkins*, 14 Eq. 402; *Orange v. Pickford*, 4 Dr. 363.

Sec. 10 of  
the Wills  
Act.

By the 10th section of the Wills Act no appointment made by will in exercise of any power shall be valid unless the same be executed in manner thereinbefore required; and every will so executed shall, so far as respects the execution and attestation thereof, be a valid execution of a power of appointment by will, notwithstanding it shall have been expressly required that a will made in exercise of such power should be executed with some additional or other form of execution or solemnity.

Applies to  
powers  
created  
since the  
Act.

The section applies to powers created since as well as to powers created before the Act. *Hubbard v. Lees*, L. R. 1 Ex. 255.

But only  
to powers  
testamen-  
tary in  
terms.

The section, however, only applies to powers which are in terms testamentary, and therefore a power to appoint by instrument in writing executed with certain formalities cannot be exercised by a will executed only with the statutory formalities. *West v. Ray, Kay*, 385; *Taylor v. Meads*, 4 D. J. & S. 597.

When there is a gift to trustees and the survivor of them his heirs and assigns upon trusts to be executed by the trustees and the survivor of them his heirs and assigns, the power of executing the trusts may be devised by the will of the survivor. *Titley v. Wolstenholme*, 7 B. 425; *Hall v. May*, 3 K. & J. 585. <sup>When a trust may be devised.</sup>

It has recently been decided that the same rule applies, when the gift is to the trustees, their heirs, executors, and administrators, the word assigns being omitted. *Osborne v. Rowlett*, 13 Ch. D. 774; see *In re Morton & Hallett*, 49 L. J. Ch. 559; 15 Ch. D. 143. The following cases, so far as they decide the contrary, may be considered overruled: *Cooke v. Crawford*, 13 Sim. 91; *Wilson v. Bennett*, 5 De G. & S. 479; *Macdonald v. Walker*, 14 B. 556; *Ashton v. Wood*, 3 Sm. & G. 436; 3 Jur. N. S. 1164.

## CHAPTER XI.

## EXECUTORS, GUARDIANS.

**Special executors.** A TESTATOR may appoint special executors of any portion of his property; see 2 Key & Elphinstone, 1355; 4 Dav. Conv. 102; Dunning, Conc. Prec. 435.

**Substituted executors.** He may substitute other executors in the event of the absence or death of those appointed. *In bonis Langford*, 1 P. & D. 458; *In bonis Foster*, 2 P. & D. 304.

**Delegation of power.** And he may delegate the power of appointing executors to another who may appoint himself. *In bonis Cringan*, 1 Hag. 548; *In bonis Ryder*, 2 Sw. & T. 127.

A person appointed executrix of all property not named in the will is not an executrix of the will or entitled to probate. *In bonis Wakeham*, 2 P. & D. 395.

**Executors appointed by several instruments.** Where there are several testamentary papers not inconsistent and each appointing sole executors, probate is granted to all the executors. *In bonis Graham*, 3 Sw. & T. 69; *Greaves v. Price*, 3 Sw. & T. 71. See *In bonis Morgan*, 1 P. & D. 323.

Reappointment by a codicil of some of the executors appointed by the will together with new executors does not revoke the appointment of executors contained in the will. *In bonis Leese*, 2 Sw. & T. 442; *In re Lloyd*, 1 R. 6 Eq. 348.

A codicil appointing a person "sole" executor of the will revokes the appointment of executors made by the will. *In bonis Lowe*, 3 Sw. & T. 478; *In bonis Baily*, 1 P. & D. 628.

**Executor according to tenor.** Though no executors are expressly appointed, if the testator has directed any person to pay his debts and administer the estate, such person will be executor accord-

ing to the tenor. *In bonis Montgomery*, 5 N. of C. 99 ;  
*In bonis Adamson*, 3 P. & D. 253.

The appointment of a person sole trustee of a will will not in itself make him executor according to the tenor. *In bonis Punchard*, 2 P. & D. 369 ; *In bonis Lowry*, 3 P. & D. 157. See *Boardman v. Stanley*, I. R. 6 Eq. 590 ; *Smith v. Kerran*, I. R. 11 Eq. 447.

Sole trustee not an executor.

Trustees to whom the testator's personal estate is given, subject to a charge of debts, are in effect executors. *In bonis Baylis*, 1 P. & D. 21 ; *In bonis Bell*, 4 P. D. 85.

A request that certain persons shall act for or with an executrix appointed by the will, makes them executors according to the tenor. *In bonis Brown*, 2 P. D. 110.

Request to act with executrix.

A person appointed to carry out the intentions of the will is executor according to the tenor. *In re Archdall*, 5 L. R. Ir. 168.

By 12 Car. II. c. 24, sect. 8, it is enacted that where any person hath or shall have any child or children under the age of one and twenty years, and not married at the time of his death, that it shall and may be lawful to and for the father of such child or children, whether born at the time of the decease of the father, or at that time in *ventre sa mère*, or whether such father be within the age of one and twenty years, or of full age, by his deed executed in his lifetime, or by his last will and testament in writing, in the presence of two or more credible witnesses, in such manner and from time to time as he shall respectively think fit, to dispose of the custody and tuition of such child or children, for and during such time as he or they shall respectively remain under the age of one and twenty years, or any lesser time, to any person or persons in possession or remainder, other than popish recusants ; and that such disposition of the custody of such child or children made since the 24th of February, 1645, or hereafter to be made, shall be good and effectual against all and every person or persons claiming

Parents may dispose of the custody of children during minority.

Actions of  
ravish-  
ment of  
wards.

the custody or tuition of such child or children as guardian in socage or otherwise; and that such person or persons, to whom the custody of such child or children hath been or shall be so disposed or devised as aforesaid, shall and may maintain an action of ravishment of ward or trespass against any person or persons which shall wrongfully take away or retain such child or children, for the recovery of such child or children; and shall and may recover damages for the same in the said action, for the use and benefit of such child or children.

The lands  
of children  
and the  
manage-  
ment of  
their per-  
sonal  
estate by  
their  
guardians.

The 9th section of the same statute enacts, that such person or persons, to whom the custody of such child or children hath been or shall be so disposed or devised, shall and may take into his or their custody to the use of such child or children, the profits of all lands, tenements, and hereditaments of such child or children; and also the custody, tuition, and management of the goods, chattels, and personal estate of such child or children, till their respective age of one and twenty years, or any lesser time, according to such disposition aforesaid; and may bring such action or actions in relation thereunto, as by law a guardian in common socage may do.

Section 1 of the Wills Act declares that the word will shall include a disposition by will of the custody of a child under 12 Car. II. c. 24. It follows, therefore, that an infant cannot appoint testamentary guardians by will (section 7).

An instrument appointing a testamentary guardian is valid though attested by the guardian. *Morgan v. Hatchell*, 24 L. J. Ch. 135.

Father  
may dele-  
gate ap-  
pointment  
of guar-  
dian.  
Illegiti-  
mate  
children.

The statute enables a father to give a testamentary guardian authority to nominate another as guardian. *In bonis Parnell*, 2 P. & D. 379.

A father has no legal power to appoint a testamentary guardian of his illegitimate children, though the person



selected by him would in most cases be appointed by the Court. *Sleeman v. Wilson*, 13 Eq. 36.

The testamentary guardian has a legal right to the custody of the child, and is entitled to a writ of habeas corpus to obtain possession of his ward. *In re Andrews*, L. R. 8 Q. B. 153. Guardian entitled to custody.

There is nothing to prevent a father from appointing a Roman Catholic ecclesiastic the guardian of his children. *Talbot v. Earl of Shrewsbury*, 4 M. & Cr. 672; *In re Andrews*, L. R. 8 Q. B. 153; *In re Byrnes*, I. R. 7 C. L. 199.

No precise words are necessary to appoint a testamentary guardian. How guardian appointed.

Thus it is sufficient to direct, that the children are to be brought up under the care and direction of a certain person, or that he is to have the management and care of the house and children, or that he is to take care to see the child educated. *Bridges v. Hales*, Moseley, 109; *Miller v. Harris*, 14 Sim. 540; 9 Jur. 388; *Lady Teynham v. Lennard*, 4 B. P. C. 302.

A person appointed guardian of the estate is not a testamentary guardian. *In re Norbury*, I. R. 9 Eq. 134.

The mother is the natural guardian, and if the father appoints no guardian the mother's right remains, even though the father directs that she shall not be guardian. *In re Wood*, 16 W. R. 164.

A father is entitled to direct the religion in which he wishes his children to be brought up after his death. Religious education.

But the cases show, that less weight will be given to the wishes of a deceased than to those of a living father, and that in the former case the court will not interfere in favour of the religion selected by the father if he has done anything amounting to an abandonment of his rights, or if the interference would not be for the benefit of the children. *Hawksworth v. Hawksworth*, 6 Ch. 539;

*Andrews v. Salt*, 8 Ch. 622; *In re Agar-Ellis*; *Agar-Ellis v. Lascelles*, 10 Ch. D. 49.

Persons having lawful custody of bodies may permit them to undergo anatomical examination in certain cases.

By 2 & 3 Will. IV. c. 75, "An Act for regulating Schools of Anatomy," s. 7, it is enacted that it shall be lawful for any executor, or other party having lawful possession of the body of any deceased person, and not being an undertaker, or other party interested with the body for the purpose only of interment, to permit the body of such deceased person to undergo anatomical examination, unless, to the knowledge of such executor or other party, such person shall have expressed his desire, either in writing at any time during his life, or verbally in the presence of two or more witnesses during the illness whereof he died, that his body after death might not undergo such examination, or unless the surviving husband or wife, or any known relative of the deceased person, shall require the body to be interred without such examination.

Provision in case of persons directing anatomical examinations after their death.

By section 8 of the same statute it is enacted, that if any person, either in writing at any time during his life, or verbally in the presence of two or more witnesses during the illness whereof he died, shall direct that his body, after death, be examined anatomically, or shall nominate any party by this Act authorised to examine bodies anatomically to make such examination, and if, before the burial of the body of such person, such direction or nomination shall be made known to the party having lawful possession of the dead body, then such last-mentioned party shall direct such examination to be made, and in case of any such nomination as aforesaid shall request and permit any party so authorised and nominated as aforesaid to make such examination, unless the deceased person's surviving husband or wife, or nearest known relative, or any one or more of such person's nearest known relatives, being of kin in the same degree, shall require the body to be interred without such examination.

## CHAPTER XII.

## ELECTION.

A TESTATOR can of course only dispose of his own property by will; however, by means of the doctrine of election, he may in many cases in effect dispose of the property of others. Thus, where a testator disposes of the property of a person, and at the same time gives that person property of his own by his will, the person whose property is given away is bound to elect whether he will keep his own property and surrender an equivalent value of the benefits given him by the will, or whether he will take entirely under the will. *Rogers v. Jones*, 3 Ch. D. 688. When election arises.

The compensation, which has to be made by a person electing to take against the will, is a charge upon the benefits he receives under the will, so that if he takes real estate under the will and dies before making compensation, the compensation is a charge on the land and is not payable out of his personal estate. *Pickersgill v. Rodger*, 5 Ch. D. 163.

The person electing must elect to take under or against the whole instrument, will and codicils, and not merely that part of it which disposes of his own property. *Cooper v. Cooper*, L. R. 6 Ch. 15; *ib.* 7 H. L. 53. Legatee must elect for or against the whole instrument, will, and codicils.

If, however, there is a gift expressly in lieu of dower, or the testator declares that the legatee is to elect only between one of the benefits given him by the will and his own property, election will be confined to that. *Walker v. Inge*, Rom. N. of C. 95; *East v. Cook*, 2 Ves. Sen. 30, explained Unless the testator limits the election to some particular benefit.

in *Wilkinson v. Dent*, 6 Ch. 339; *Coote v. Gordon*, I. R. 11 Eq. 180.

Gift in satisfaction of a debt will not limit election to that particular gift.

But a gift, though declared to be in satisfaction of any sums in which the testator may be indebted to the donee at the time of his decease, or in satisfaction of a rent charge, the object being testamentary bounty, will put the legatees to their election to take under or against the whole will.

*Wilkinson v. Dent*, 6 Ch. 339; see, too, *Coutts v. Acworth*, 9 Eq. 519.

Election arises only between a title under and a title *dehors* the will.

No election where one of two gifts is onerous.

Election arises only between a gift by the will and something belonging to the legatee by a title *dehors* the will. Thus, no case for election arises where a testator has given a legatee several legacies, some of which are onerous. In such a case the legatee may reject the onerous legacies without forfeiting the others. *Andrew v. Trinity Hall*, 9 Ves. 525; *Moffett v. Bates*, 3 Sm. & G. 468; *Warren v. Rudall*, 1 J. & H. 1; *Aston v. Wood*, 22 W. R. 893; 43 L. J. Ch. 715.

Unless there is an intention that the legatee is to take all or none.

Though, if the onerous and beneficial legacies are given together as one entire gift, or there is an intention that the legatee shall not take one without the other, he must take all or none. *Green v. Britten*, 42 L. J. Ch. 187; *Talbot v. Lord Radnor*, 3 M. & K. 252; see *Fairtlough v. Johnstone*, 16 Ir. Ch. 442.

No election between two clauses of a will.

And upon the same principle election does not arise as between two clauses in the same will, the title to both the properties between which the legatee would have to elect being derived under the will. *Wollaston v. King*, 8 Eq. 165; *Wallinger v. Wallinger*, 9 Eq. 301.

Devises upon condition distinguished from election.

Devises and bequests upon condition must be distinguished from cases of election. *Cooper v. Cooper*, L. R. 6 Ch. 15; *ib.* 7 H. L. 53.

In the latter it is immaterial whether the testator knew or not that the property of which he was disposing was not his own, in the former he must have known that it

was not. The characteristic of the former is forfeiture, of the latter compensation. Thus a devise to A. on condition of his conveying certain property of his own would be a condition and not a case for election. See *Middleton v. Windross*, 16 Eq. 212; *Boughton v. Boughton*, 2 Ves. Sen. 12; *Fearon v. Fearon*, 3 Ir. Ch. 19.

In order to raise a case for election there must be on the face of the will a disposition on the part of the testator of something belonging to a person who takes an interest under the will.

To raise election the testator must actually dispose of something not his own.

The intention to dispose of something not his own must appear on the face of the will, and evidence is not admissible to show that the testator considered certain property as his own, and intended to pass it by words not directly referring to it; see *Pole v. Lord Somers*, 6 Ves. 322; *Doe v. Chichester*, 4 Dow. 76, pp. 89, 90.

An erroneous belief on the part of the testator, even though he expressly declares that he has made his will on the faith of it, will not raise an election. *Langston v. Langston*, 21 B. 552; *Dashwood v. Peyton*, 18 Ves. 27; *Box v. Barrett*, 3 Eq. 244; see *Lewis v. Lewis*, I. R. 11 Eq. 340.

Erroneous belief or recital will not raise election.

It makes no difference whether the property attempted to be disposed of by the testator is vested contingent or reversionary; though in the latter case, if the reversionary interest in personalty of a married woman is disposed of she cannot elect till her interest falls into possession. *Williams v. Mayne*, I. R. 1 Eq. 519; *Webb v. Earl of Shaftesbury*, 7 Ves. 480; *Wilson v. Lord Tounshend*, 2 Ves. Jun. 697.

In respect of what property of a legatee election arises.

The release of a debt due to the testator from A., the testator at the same time releasing a debt due from B. to A., will put A. to his election. *Synge v. Synge*, 15 Eq. 389; 9 Ch. 128.

Release of a debt due from a third person to a legatee.

It is sufficient to raise election if the property disposed of by the testator is the property of a person taking a

Legatee must be entitled to

the property given away at the testator's death.

benefit under the will at the date of the testator's death, and a title as next of kin to an intestate whose estate has not at the date of the death been fully administered is sufficient. *Cooper v. Cooper*, L. R. 6 Ch. 15; *ib.* 7 H. L. 53; see *Bennett v. Houldsworth*, 6 Ch. D. 671.

Title as next of kin to an intestate.

In such a case, for the purpose of election, the interest of the next of kin is to be estimated as it was at the death of the intestate, his debts being rateably distributed over his estate, *ib.*

But if the property in question is not acquired till after the death of the testator, no election arises in respect of it. *Howells v. Jenkins*, 2 J. & H. 706; 1 D. J. & S. 617; *Grissell v. Swinhoe*, 7 Eq. 291, in which case it seems the husband would have been bound to elect if he had been his wife's administrator at the testator's death. See *Cooper v. Cooper*, 6 Ch. 15, p. 21.

Derivative title.

And where a wife had elected to take an estate against the will, the husband, being tenant by the curtesy, was not again put to his election between his tenancy by the curtesy and benefits given to him by the will, compensation having been already made for the value of the estate. *Lady Cavan v. Pulteney*, 2 Ves. Jr. 544; 3 Ves. 384.

Mere personal right.

So, too, the right of a creditor to be paid out of property belonging to an intestate, and disposed of by the testator, being merely a personal right, will not put the creditor to election between his claim upon the intestate's estate and a benefit given by the will. See *Cooper v. Cooper*, L. R. 7 H. L. 53, p. 66. See *Kidney v. Coussmaker*, 12 Ves. 136.

Appointment under a special power with invalid condition super-added

When a testator having a special power of appointment over certain property appoints absolutely to the objects of the power, and superadds a condition or request that they shall give the property in a certain way, no case of election arises, the illegal condition being considered struck out of the will. *Carver v. Bowles*, 2 R. & M. 301; *Blackett v.*

*Lamb*, 14 B. 482; *Woolridge v. Woolridge*, Johns. 63; *Churchill v. Churchill*, 5 Eq. 44. See *King v. King*, 15 Ir. Ch. 479; *Moriarty v. Martin*, 3 Ir. Ch. 26.

Where, however, there is no absolute gift in the first instance, but the original gift is subject to invalid limitations over and restrictions, the objects of the power must elect between their rights under the power and the other benefits given them by the will. *Tomkyns v. Blane*, 28 B. 422.

And generally election arises, where property subject to a special power of appointment vested in the testator, is given by him to persons not the objects of the power when the latter receive benefits under the will. *Whistler v. Webster*, 2 Ves. Jun. 366.

It must be presumed *prima facie* that a testator only means to dispose of what is his own.

Therefore, even before the Wills Act, general words will not be construed to apply to property not belonging to the testator, though at the date of his will and his death he may have no property of his own to which the words could apply. *Read v. Crop*, 1 B. C. C. 492; *Jervoise v. Jervoise*, 17 B. 566; *Thornton v. Thornton*, 11 Ir. Ch. 474.

Nor will the fact that the devise is to uses in strict settlement extend general words to more than the testator's interest, though his devisable interest is only an estate *pur autre vie*. See *Cosby v. Lord Ashdown*, 10 Ir. Ch. 219.

The testator may of course show that he included lands not his own under the general words by describing them as lands in his own occupation. *Honywood v. Foster*, 30 B. 14.

And if the devise be of property in a particular place, if there is any property of the testator answering the description it will be confined to that. *Rancliffe v. Purkyns*, 6 Dow. 149; *Maddeson v. Chapman*, 1 J. & H. 470.

raises no election.

It does when the whole appointment is invalid.

Property subject to a special power.

What is a disposition by a testator of property not his own. General words limited to testator's own property.

Devise in strict settlement where testator has only estate *pur autre vie*.

Property in a particular place.

Property held in joint tenancy.

So where a testator has transferred stock into the names of himself and his wife, a general gift of his stock, or even a gift of stock exactly the same in amount as that so transferred, will not put the wife to her election. *Dummer v. Pitcher*, 2 M. & K. 262; *Poole v. Odling*, 10 W. R. 337.

To raise a case of election there must be a specific reference to the stock in question. *Coates v. Stevens*, 1 Y. & C. Ex. 66; *Grosvenor v. Durston*, 25 B. 97.

The case is more difficult where the testator has a devisable interest in certain property, and the question arises whether he intended to give the whole property.

When the testator is entitled in moieties.

1. Where the testator is entitled in moieties:

If the devise is of the testator's interest or property in a house or lands, only what belongs to him is intended to pass. *Henry v. Henry*, 1 R. 6 Eq. 286.

Gift of a house with a direction to repair.

But if the gift is of a house by a particular description, this is a sufficient indication of an intention to pass the whole house, at any rate if there is a direction to repair. *Padbury v. Clark*, 2 Mac. & G. 298; *Howell v. Jenkins*, 2 J. & H. 706. See *Swan v. Holmes*, 19 B. 471.

And the result is the same where there is no such direction. *Fitzsimons v. Fitzsimons*, 28 B. 417; *Miller v. Thurgood*, 33 B. 496; *Wilkinson v. Dent*, 6 Ch. 339.

When the testator is entitled to land subject to a charge.

2. Where land is subject to a charge, a devise of the land without more is a devise subject to the charge. *Stephens v. Stephens*, 3 Dr. 697; 1 De G. & J. 62; *Henry v. Henry*, 1 R. 6 Eq. 286.

On the other hand, if the testator repudiates the instrument creating the charge, and the dispositions of his will are inconsistent with that instrument, the property is intended to pass freed from the charge. *Sadlier v. Butler*, 1 R. 1 Eq. 415.

So, too, if the devise of the land is inconsistent with the charge, as if it be for a long term on trust to raise a sum immediately for payment of debts and legacies, the prior



charge being itself secured by a long term. *Blake v. Bunbury*, 1 Ves. Jun. 514.

3. Where the testator has a reversionary interest in land, limited to take effect after the decease of persons to whom he gives a life interest in those lands, so that the will would be of no effect if it were intended only to deal with the reversion, and there are besides powers of leasing and management implying actual enjoyment, the intention must have been to dispose of the whole property. *Welby v. Welby*, 2 V. & B. 187; *Wintour v. Clifton*, 21 B. 447; 8 D. M. & G. 641.

When the testator is entitled to the reversion in lands.

So, too, a direction that an annuity is to be paid to a person for life out of lands of which the testator has only the reversion shows an intention to dispose of the whole. *Ustick v. Peters*, 4 K. & J. 437.

But if in a doubtful case the testator expressly confirms the settlement by which the reversion in the property in question is limited to him, only his own interest will be held to be intended to pass. *Rancliffe v. Parkyns*, 6 Dow. 149.

4. The question whether the testator has shown an intention to dispose of his real estate, freed from the widow's right to dower or freebench, is of importance only, with regard to the former, in the case of widows married prior to the 1st January, 1834; and with regard to the latter, in the case of wills not coming under the Wills Act; see the Dower Act, 3 & 4 Will. 4, c. 105, ss. 4 and 14. *Lacey v. Hill*, 19 Eq. 346.

What amounts to an intention to dispose of lands free from dower or freebench.

As to freebench, it was decided in *Lacey v. Hill*, *supra*, that, by virtue of the 3rd section of the Wills Act, a devise of copyholds, though not surrendered to the uses of the will, is sufficient to bar the widow's claim. The point does not appear to have been raised in *Thompson v. Burra*, 16 Eq. 592.

In cases, however, under the old law, the widow is, of Gift in lieu of dower—

course, put to her election if a legacy is given to her expressly in lieu of dower. *Sopwith v. Maughan*, 30 B. 235.

what it includes.

A legacy in lieu of dower would, it seems, also include freebench and dower out of lands which the testator had no power to devise. *Nottley v. Palmer*, 2 Dr. 93; *Walker v. Walker*, 1 Ves. Sen. 54. See *Wetherell v. Wetherell*, 4 Giff. 51.

What is inconsistent with the widow's right to dower.

If the dispositions of the will are inconsistent with the widow's right to have her dower set out by metes and bounds, she will be put to her election. This will be the case :—

Personal use by the devisee.

a. If a house, being a portion of the property devised, is given for the personal use and occupation of the devisee. *Miall v. Brane*, 4 Mad. 119; *Roadley v. Dixon*, 3 Russ. 192.

Devise in definite proportions.

b. A devise of realty in definite proportions between the widow and others would not itself show that the widow was not intended to take her dower. But if the property is particularised so as to show that the testator is giving not merely his estate, but the whole property itself, this is sufficient to show that dower was meant to be excluded. *Reynolds v. Torin*, 1 Russ. 129; *Chalmers v. Storril*, 2 V. & B. 222, as explained in *Bending v. Bending*, 3 K. & J. 257. See *Roberts v. Smith*, 1 S. & St. 513. In *Dickson v. Robinson*, Jac. 503, the will is not stated.

Trust to sell and divide.

A direction that the proceeds of sale are to be divided in certain shares will not have this effect. *Ellis v. Lewis*, 3 Ha. 314.

Powers of leasing.

c. If powers of leasing are given, even though they be only from year to year. *Reynard v. Spence*, 4 B. 103; *O'Hara v. Chainé*, 1 J. & Lat. 662; *Parker v. Sowerby*, 1 Dr. 488; 4 D. M. & G. 321; *Lowes v. Lowes*, 5 Ha. 501; *Hall v. Hill*, 1 Dr. & War. 94; *Linley v. Taylor*, 1 Giff. 67; see *Warbutton v. Warbutton*, 2 Sm. & G. 163.

And it seems that a power of leasing is inconsistent with the widow's right to freebench, though it may not be the custom of the manor to set out freebench by metes and bounds. *Thompson v. Burra*, 16 Eq. 592.

But a trust for sale will not have this effect, unless the property given in trust for sale is specifically directed to include something such as a house, the whole of which the testator must have intended to be subject to the trusts. *Gibson v. Gibson*, 1 Dr. 42; *Bending v. Bending*, 3 K. & J. 257; *Parker v. Downing*, 4 L. J. Ch. 198.

The gift of an annuity to the wife, charged upon the property subject to dower, will not put her to election. *Dowson v. Bell*, 1 Keen, 761; *Harrison v. Harrison*, 1 Keen, 765; *Holdich v. Holdich*, 2 Y. & C. C. 18.

Nor will a devise of a portion of the testator's real estate to his widow prevent her from claiming dower in the rest. *Lawrence v. Lawrence*, 2 Ver. 365; 1 Eq. C. Ab. 218, pl. 2; 1 Freem. 234; 3 B. P. C. 484.

5. Under the old law, by which a testator was unable to dispose of lands acquired after the date of his will, the heir was nevertheless put to his election if there was a clear intention to dispose of them.

It is clear that such an intention is sufficiently indicated where the testator draws a distinction between lands to which he is and lands to which he may be entitled at his decease. *Schroder v. Schroder*, Kay, 578; 24 L. J. Ch. 510; *Hance v. Truwhitt*, 2 J. & H. 216.

And it seems the words "land which I shall die possessed of" sufficiently indicate an intention to pass after-acquired lands, and not merely so much of the lands belonging to the testator at the date of his will as shall remain at his death. *Churchman v. Ireland*, 1 R. & M. 250, overruling *Back v. Kett*, Jac. 534.

Under the old law, where the will was insufficiently executed to pass realty, the heir was not put to his elec-

Trust for sale.

Gift of annuity charged on land subject to dower.

When the heir is put to election.

Disposition of after-acquired lands before the Wills Act.

No election when the will

invalid to  
pass realty.

tion between realty attempted to be disposed of by the will and benefits given to him, so much of the will as attempted to dispose of realty being considered non-existent. *Sheddon v. Godrich*, 8 Ves. 481.

So, too, when under the old law the testator was incompetent to dispose of property from infancy or coverture no case of election arose. *Hearle v. Greenbank*, 1 Ves. 298; 3 Atk. 697, 716; *Rich v. Cockell*, 9 Ves. 370.

But the case is different where the devise is upon condition. *Boughton v. Boughton*, 2 Ves. Sen. 12.

Foreign  
heir.

These rules do not, however, apply to a foreign heir, and therefore if there is clear evidence of an intention to dispose by will of land in Scotland or elsewhere which cannot be so disposed of, the heir is put to his election between the land and the benefits he may take under the will. *Brodie v. Barry*, 2 V. & B. 127; *Dewar v. Maitland*, L. R. 2 Eq. 834.

It must be clear that land in Scotland or elsewhere is referred to, and therefore general words will only be held to refer to those lands upon which the will can take effect. *Johnson v. Telford*, 1 R. & M. 244; *Allen v. Anderson*, 5 Ha. 763; *Maxwell v. Maxwell*, 16 B. 106; 2 D. M. & G. 705; *Maxwell v. Hyslop*, 4 Eq. 407.

But a devise of "all my real estate in any part of the United Kingdom or elsewhere" has been held sufficient to put the Scotch heir to election. *Orrell v. Orrell*, 6 Ch. 302.

Will of  
married  
woman.

It would seem that no case for election arises on the part of next of kin, where the will of a married woman is operative at the time it was made, but afterwards becomes inoperative. *Blaiklock v. Grindle*, 7 Eq. 215.

To raise  
election  
there must  
be a gift  
of free  
disposable  
property  
to the per-

The principle of election being compensation, in order to put persons whose property the testator has given away to their election, there must be a gift to them of free disposable property out of which compensation may be made. Thus, an appointment by the testator of pro-

erty, subject to a special exclusive power of appointment, to some objects of the power whose property the testator attempts to dispose of, is not a gift of free disposable property, in respect of which they will be bound to elect. *Fowler's Trust*, 27 B. 362; *Aplin's Trust*, 13 W. R. 1062. sons whose property is given away.

Upon the question, whether, where a stranger appoints a testamentary guardian to children and gives their father a benefit under the will, the father is put to his election, so that he cannot after receiving the legacy withhold compliance with the condition for the education of his children, see *Blake v. Leigh*, Amb. 306; *De Manneville v. De Manneville*, 10 Ves. 52, 63.

## CHAPTER XIII.

## WHO MAY BE DEVISEES OR LEGATEES.

## 1. Corporations.

1. PRIOR to the Wills Act a devise of lands to a corporation was void, bodies corporate being excepted out of the statutes 32 Hen. 8, c. 1, 34 & 35 Hen. 8, c. 5, sec. 5.

And it seems the stat. 43 Eliz. c. 4, had no effect in passing the legal estate where the devise was to a corporation existing for charitable purposes, notwithstanding *Benet Coll. v. Bp. of London*, 2 W. Bl. 1182; see *Inc. Soc. v. Richards*, 1 Dr. & War. 258.

The Wills Act repeals the statutes 32 Hen. 8, c. 1, and 34 & 35 Hen. 8, c. 5, but does not expressly authorise devises to corporations, and since the inability of corporations to hold lands was created by various statutes antecedent to the 34 & 35 Hen. 8, c. 5, the mere repeal of that statute does not give validity to devises to corporations.

Since the Wills Act, however, the inability is not in the power of devising, but in the capacity of corporations to take, and it would seem to follow that corporations with power to hold land, such as companies incorporated under the Public Companies' Acts, 25 & 26 Vict. c. 89, sec. 18, might take by devise except so far as objections might arise on the ground of perpetuity. The question is, however, not likely to be of much practical importance; see *Incorp. Soc. v. Richards*, 1 Dr. & War. 258; *Thompson v. Shakespear*, Joh. 612; 1 D. F. & J. 399;

*Carne v. Long*, 2 D. F. & J. 75; *Cocks v. Manners*, 12 Eq. 574; *Chaudière Mining Company v. Desbarats*, L. R. 5 P. C. 277.

2. By the statute 33 Vict. c. 14, real and personal property of every description may be taken, acquired, held, or disposed of, by an alien in the same manner in all respects as by a natural-born British subject.

It has been decided that the Act is not retrospective. And apparently it does not apply to a will made before the passing of the Act, though not coming into operation till afterwards. *Sharp v. St. Sauveur*, 7 Ch. 343.

In cases before the Act land devised to an alien remains in him till office found, when it devolves to the Crown, and this is the case whether the land is devised to trustees or not. *Barrow v. Wadkin*, 24 B. 1; *Sharp v. St. Sauveur*, 7 Ch. 343.

An alien could always take the proceeds of land devised on trust for sale. *Du Hourmelin v. Sheddon*, 1 B. 79; 4 M. & Cr. 525.

3. Formerly personal property vested in a felon after his conviction, during the period of his punishment or before his pardon, was forfeited to the Crown. *Roberts v. Walker*, 1 R. & M. 752.

But property not vested in a felon till after his imprisonment was not forfeited. *Stokes v. Holden*, 1 Kee. 145; *Barnett v. Blake*, 2 Dr. & S. 117; *Gough v. Davies*, 2 K. & J. 623; *Re Thompson's Trusts*, 22 B. 506; *Re Harrington's Trust*, 29 B. 24.

Now, by 33 & 34 Vict. c. 23, forfeiture and escheat for treason, felony, and suicide are abolished; and by section 10 all the real and personal property, including choses in action, to which the convict was at the time of his conviction, or shall afterwards become entitled, vests in an administrator appointed under the Act.

By the Civil Procedure Acts Repeal Act, 1879 (42 & 43

Vict. c. 59), s. 3, outlawry in consequence of any civil proceeding is abolished.

4. Attesting witnesses.

4. By the 15th section of the Wills Act, a legacy given to an attesting witness, or to the husband or wife of an attesting witness, is void.

The subsequent marriage of an attesting witness to a devisee does not avoid the devise. *Thorpe v. Bestwick*, 6 Q. B. D. 311.

A person attesting the signature of two marksmen, witnesses to a will, is himself an attesting witness. *Wigan v. Rowland*, 11 Ha. 157.

But a gift by will to the attesting witness of a codicil is good. *Gurney v. Gurney*, 3 Dr. 208.

Where, however, a contingent gift by will is made absolute by a codicil which the legatee attests, and the legatee could only have taken under the codicil, the gift is void. *Guskin v. Rogers*, L. R. 2 Eq. 284.

And a gift to an attesting witness is void, though there may be a sufficient number of witnesses without him. *Randfield v. Randfield*, 11 W. R. 847, see 8 H. L. 225; *Cozens v. Crout*, 21 W. R. 781; see *In bonis Sharman*, 1 P. & D. 661, and see *ante*, p. 30.

A gift to a witness attesting the will is good, if the will is afterwards revived by a codicil referring to it. *Anderson v. Anderson*, 13 Eq. 381.

A gift to an attesting witness as trustee is not void. *Cresswell v. Cresswell*, 6 Eq. 69.

A gift to a trustee upon trusts declared by parol in favour of an attesting witness is void. *In re Fleetwood*; *Sidgreaves v. Brewer*, 49 L. J. Ch. 514; 15 Ch. D. 594.



## CHAPTER XIV.

## DESCRIPTION.—WHAT PASSES UNDER A SPECIFIC DESCRIPTION.

WITH regard to the question what evidence is admissible for the purpose of discovering to what the terms of description employed by the testator refer, evidence of the testator's intention must be distinguished from evidence of circumstances from which the Court may conclude what the testator's intention must have been. The former evidence is admissible only in rare cases. The latter is generally admissible. Thus:

1. "All facts relating to the subject matter of the devise, such as that it was or was not in the possession of the testator, the mode of acquiring it, the local situation, and the distribution of the property, are admissible to aid in ascertaining what is meant by the words used in the will." *Doe d. Templeton v. Martin*, 4 B. & Ad. 771, 785, per Parke, J.; *Sanford v. Raikes*, 1 Mer. 646. What evidence is admissible.

2. Words of art, foreign words, nicknames may be explained by evidence. *Kell v. Charmer*, 23 B. 195; *Goblet v. Beechey*, 3 Sim. 24; 2 R. & My. 624; *Lee v. Paim*, 4 Ha. 251. Surrounding circumstances.

3. Where a word has a meaning in common use, but has a different meaning by local custom, evidence of the custom is admissible. *Shore v. Wilson*, 9 Cl. & F. 545, 566; *Richardson v. Watson*, 1 Nev. & M. 575; *Clayton v. Gregson*, 5 A. & E. 302; *Smith v. Wilson*, 3 B. & Ad. 728; *Anstee v. Nelms*, 1 H. & N. 225. Evidence of custom.

It has been held that, where a measure is defined by statute, evidence is not admissible to show that the word has a different meaning by custom. *O'Donnell v. O'Donnell*, 1 L. R. Ir. 284.

Word with natural meaning, but nothing to which it can apply.

4. Where a word has a meaning in ordinary language, but there is nothing to which it can apply, evidence is admissible to show that the testator used the word in a meaning peculiar to himself. This case falls within the second head above mentioned.

Word with natural meaning and something to which it applies.

5. But if the word has a meaning in ordinary language, and there is something to which it applies, evidence is not admissible to show that the testator used it in a different or wider sense, there being no general custom to that effect. *Millard v. Bailey*, L. R. 1 Eq. 378.

Devise of estate by name.

6. If lands are devised by a particular title, evidence is admissible to show what the testator habitually included under the name. *Doe d. Beach v. Lord Jersey*, 3 B. & C. 180; 1 B. & Ald. 550; *Ricketts v. Turquand*, 1 H. L. 472; *Webb v. Byng*, 1 K. & J. 580; *Whitfield v. Langdale*, 1 Ch. D. 61 (devise of Claggetts); *Jennings v. Jennings*, 1 L. R. Ir. 552.

Devise of estate of or at A.

7. Where a testator devises his estate of A., or at A., and there is an estate answering the description, evidence is not admissible to show in what sense the testator used the expression. *Doe d. Chichester v. Oxenden*, 3 Taunt. 147; 4 Dow. 65; *Doe d. Browne v. Greening*, 3 M. & S. 171.

Patent ambiguity may not be explained.

8. No evidence is admissible to explain a patent ambiguity; for instance, if the testator uses symbols, which on the face of the will require explanation and have no meaning to any one but himself. *Clayton v. Lord Nugent*, 13 M. & W. 206; see *Sullivan v. Sullivan*, 1 R. 4 Eq. 457.

When the admissible evidence has been taken, the following rules apply to determine to what the words of description used by the testator refer :

1. *Non accipi debent verba in falsam demonstrationem quæ competunt in limitationem veram.*

Where there is something answering the testator's description that alone passes.

Therefore, where there is property, which exactly fits all the terms of the description, the whole of it passes and no more. *Webber v. Stanley*, 6 C. B. N. S. 698; *Smith v. Ridding*, L.R. 12, 33; *K. v. Seal*, 5 Dea. & Taylor (1894) 1 Ch. 316.

It is immaterial whether the larger words precede or follow the restricting words, provided there is something to which the whole description applies.

Thus, a devise of lands described as in the parish A., and in the occupation of a particular person, will not pass lands not in the occupation of that person. *Doe d. Parkin v. Parkin*, 5 Taunt. 321; *Morrell v. Fisher*, 4 Eq. 591; *Homer v. Homer*, 8 Ch. D. 758.

Reference to occupation.

So the general description may be restricted by a reference to the person from whom the testator purchased or derived the land. *Doe d. Tyrrell v. Lyford*, 4 M. & S. 550; *Doe d. Conolly v. Vernon*, 5 East, 51; *Doe d. Harris v. Greathed*, 8 East, 91; *Roe d. Ryall v. Bell*, 8 T. R. 579; *Doe d. Newton v. Taylor*, 7 B. & C. 384; *Cooch v. Walden*, 46 L. J. Ch. 639.

Reference to title of person from whom lands derived.

If the lands are described as being at A. in the county of B., lands not in that county will not pass. *Webber v. Stanley*, 16 C. B. N. S. 698; *Pedley v. Dodds*, 2 Eq. 819.

Reference to county.

Description of a farm as freehold excludes a leasehold portion of the farm. See p. 165; *Stone v. Greening*, 13 Sim. 390; *Hall v. Fisher*, 1 Coll. 47.

Freehold farm.

It seems that a devise of lands at A. is not to be limited to lands within the parish of A., but would carry immediately adjoining lands in a neighbouring parish.

Devise of lands at A.

This is clearly the case where the devise is of lands at or near A. *Homer v. Homer*, 8 Ch. D. 758.

At or near A.

But a devise of lands at A. will not include lands some distance from A., where there are lands to which the description applies. *Attwater v. Attwater*, 18 B. 330; *Doe v. Bower*, 3 B. & Ad. 453; see *Doe d. Dell v. Pigott*, 1 J. B.

Moo. 274; 7 Taunt. 552; *Pogson v. Thomas*, 8 Sc. 621; 6 Bing. N. C. 337.

Manufactory in a street.

A devise of a manufactory on the west side of a street, with the appurtenances, will not include a manufactory on the east side of the street. *Smith v. Ridgway*, L. R. 1 Ex. 46, 331.

A devise of property in a street may pass the whole of a piece of land which, when purchased by the testator, had a frontage on that street and on another street, though the testator has subsequently divided the land and built two houses upon it, one abutting on one street and one on the other. *Harman v. Gurner*, 35 B. 478; see, too, *Newton v. Lucas*, 6 Sim. 54; 1 M. & Cr. 391.

Property held under lease.

A devise of two houses in a street will pass only two houses, though the testator may be possessed of three houses in the street held under the same lease, two of which are comprised in one underlease, and the third in a separate underlease. *Tapley v. Eagleton*, 12 Ch. D. 683.

So a devise of certain lands held under a lease where the testator goes on to describe the lands by name passes only such of the lands held under the lease as are named. *West v. Lawday*, 11 H. L. 375.

Everything included under the name at the testator's death passes.

In wills, since the Wills Act, everything included under the particular description at the death of the testator, though added to the estate after the date of the will, will pass. *In re Midland Railway Co.*, 34 B. 525; *Castle v. Fox*, 11 Eq. 542. *Webb v. Byng*, 1 K. & J. 580, is *contra*, but the point was barely argued.

As to whether the words "now occupied by me" would prevent lands subsequently taken into occupation from passing, see *Hutchinson v. Barron*, 9 W. R. 538; 6 H. & N. 583; *Jepson v. Key*, 10 Jur. N. S. 392; 12 W. R. 621; *Williams v. Owen*, 2 N. R. 585, and see *post*, pp. 150, 162.

2. *Falsa demonstratio non nocet, cum de corpore constat.* Inaccurate description—

a. Thus, where an object is sufficiently described, additional words, which have no application to anything, may be rejected. *Blague v. Gold*, Cro. Car. 447, 473; *Doe d. Dunning v. Cranstoun*, 7 M. & W. 1. part inaccurate;

b. Where there is a complete description and the testator goes on to add words for the purpose of identifying or elaborating the previous description, these words, if inconsistent with the previous description, may be rejected. subordinate description if inaccurate rejected.  
*Armstrong v. Buckland*, 18 B. 204; see *Slingsby v. Grainger*, 7 H. L. 273; *Travers v. Blundell*, 6 Ch. D. 436.

c. Where there is one continuous description, and there is something answering to part of it, and something answering to other part, but the two together are inconsistent, the question is, which are the leading words of description. Inconsistent description.

In the first class of cases under this head there is no repugnancy between the general terms and the particular superadded description, in the second and third class there is a repugnancy between two parts of a description.

Where the estate is devised by a specific name, followed by a reference to occupation, the reference to occupation may be rejected if the whole estate known by the name is not in the occupation of the person referred to. Name followed by occupation.  
*Goodtitle d. Radford v. Southern*, 1 M. & S. 299; *Down v. Down*, 7 Taunt. 343; 1 J. B. Moo. 80; see *Doe d. Beach v. Earl of Jersey*, 1 B. & Ald. 550; 3 B. & Cr. 870; *Paul v. Paul*, 1 W. Bl. 255; 2 Burr. 1089; see, too, *Cunningham v. Butler*, 3 Giff. 37; 7 Jur. N. S. 461; *In re Boulter*, 4 Ch. D. 241.

Upon similar principles a description by a specific name will prevail over an erroneous reference to a parish or county, or to acreage. Name followed by locality.  
*Hardwick v. Hardwick*, 16 Eq. 168; *Whitfield v. Langdale*, 1 Ch. D. 64.

Though the estate is not described by a specific name, if the general description contains words which would not be satisfied if the reference to occupation is allowed to restrict the devise, the reference to occupation may be rejected. *White v. Birch*, 36 L. J. Ch. 174; see *Doe d. Parkin v. Parkin*, 5 Taunt. 321.

What are  
the leading  
words.

For the purpose of ascertaining the leading words, it would seem that where a description is followed by restrictive words inconsistent with it, the earlier words will prevail, especially if the restrictive words are less clear and accurate than the earlier words. Cases *supra*, and *Doe d. Remow v. Ashley*, 10 Q. B. 663.

Where the more restricted description of property is followed by a wider description, which would include other property as well, it seems the more restricted description will prevail; for instance, under "my lands in Cokefield, called Hayes Lands," only so much of the Hayes Lands as were in Cokefield passed. *Woodden v. Osbourn*, Cro. El. 674; *Hall v. Fisher*, 1 Coll. 47.

Of course, if the restrictive words can be looked upon as inserted for the purpose of giving the lands carved out of the devise to some one else, they will have their full force. *Higham v. Baker*, Cro. Eliz. 16; *Press v. Parker*, 10 J. B. Moo. 158; 2 Bing. 456.

No pro-  
perty  
answering  
descrip-  
tion.

3. Where there is nothing answering to any part of the description the devise fails.

Thus a devise of lands in a particular county or parish cannot be extended to lands in an adjoining county or parish, though those may be the only lands the testator possessed. *Miller v. Travers*, 8 Bing. 244; *Barber v. Wood*, 4 Ch. D. 885.

Same rules  
apply to  
specific  
bequests.

4. The same rules are applicable to specific bequests of personal property. Therefore, if there is something which answers fully the words of description, that and that alone will pass. *Slingsby v. Grainger*, 7 H. L. 273; *Ridge v.*

*Newton*, 2 D. & War. 239; *Townend v. Townend*, 1 L. R. Ir. 180.

5. If the testator gives a certain number of specific things, and is possessed at the date of his death of a larger number, the legatee is entitled to select which he will take. *Hobson v. Blackburne*, 1 M. & K. 571; *Jacques v. Chambers*, 2 Coll. 435; *Millard v. Bailey*, L. R. 1 Eq. 378; *Tapley v. Eagleton*, 12 Ch. D. 683; see *Duckmanton v. Duckmanton*, 5 H. & N. 219; 28 L. J. Ex. 132.

The principle applies as well to a devise as to a gift of personalty.

It is immaterial whether or not the devise is made in such words as to show that the testator was aware that he was possessed of more of the things in question than he devises.

For instance, the devisee is entitled to elect whether the devise is of one of my closes called Whiteacre, or of my close called Whiteacre. *Richardson v. Watson*, 4 B. & Ad. 787, is not to be followed; see *Tapley v. Eagleton*, *suprd.*

Under a gift of such parts of certain property as a legatee shall signify her desire to possess, the legatee may take the whole, if the property is of such a nature that the legatee might make a selection so as to leave only something of no value. *Arthur v. Mackinnon*, 11 Ch. D. 385.

Probably a gift of such houses as a legatee may select would not entitle the legatee to take all the testator's houses. See, too, *Kennedy v. Kennedy*, 10 H. 438.

6. In the case of a specific bequest, even before the Wills Act, any increase between the date of the will and the death of the testator in the value of the thing specifically given belonged to the legatee. Thus a gift of the amount of a bond carried the accruing interest. *Harcourt v. Morgan*, 2 Kee. 274; *All Souls' Coll. v. Codrington*, 1 P. Wms. 597.

unless the  
description  
excludes it.

But if the description of the gift is such as to preclude the possibility of including in it any increase, such increase will not pass, as if the gift be of £300 due to me on a bond, interest will not pass. *Roberts v. Kuffin*, 2 Atk. 112; *Hawley v. Cutts*, 2 Freem. 24.

Inaccurate  
description.

7. If there is a specific gift, as, for instance, of certain stock, and the testator at the date of his will possessed no such stock, but possessed other stock nearly answering the description, the latter will pass. *Door v. Geary*, 1 Ves. Sen. 255; *Dobson v. Waterman*, 3 Ves. 307 n.; *Gallini v. Noble*, 3 Mer. 691; *Pentecost v. Ley*, 2 J. & W. 207; *Mackinley v. Sison*, 8 Sim. 561; *Sheffield v. Von Donop*, 7 Ha. 42; *Quennell v. Turner*, 13 B. 240; *Ellis v. Eden*, 25 B. 543; *Trinder v. Trinder*, L. R. 1 Eq. 695; *Townend v. Townend*, 1 L. R. Ir. 180; *Palin v. Brookes*, 26 W. R. 877; see *Ex parte Kirk*, *In re Bennett*, 5 Ch. D. 800.

Specific  
gift of  
something  
the testator  
has sold  
before the  
date of  
the will.

8. If a testator makes a specific bequest of something which he has not at the date of the will, evidence is admissible to show how the mistake arose, and the fact that the thing in question has been exchanged for something else before the date of the will, will not avoid the legacy. In such a case the legatees are entitled to a sum equal in value to the specific legacy at the testator's death. *Selwood v. Mildmay*, 3 Ves. 306; *Lindgren v. Lindgren*, 9 B. 358; *Goodlad v. Barnett*, 1 K. & J. 341.

Gift of  
something  
the testator  
thinks he  
has but  
has not.

9. On the other hand, if the testator makes a specific gift of a thing he thinks he has, but never had, or of a thing which he intends to purchase, but does not, the gift is void. *Waters v. Wood*, 5 De G. & S. 717; *Evans v. Tripp*, 6 Mad. 91; *Millar v. Woodside*, 1 R. 6 Eq. 546.

Effect of  
sale by the  
testator of  
a thing  
specifically  
bequeathed  
and subse-  
quent pur-

10. If the testator bequeaths a specific thing, for instance, a brown horse, which he afterwards sells and replaces by another brown horse, there seems to be some doubt whether the latter would pass by the effect of the 24th section of the Wills Act, which declares that a will



shall be construed to speak from the death of the testator <sup>chase of a similar thing.</sup> with reference to the real and personal estate comprised in it.

The negative was held in *Re Gibson*, L. R. 2 Eq. 669; see *Sydney v. Sydney*, 17 Eq. 65; but see *Castle v. Fox*, 11 Eq. 542, 551.

It is at any rate clear that if the description in the will does not accurately apply to the fresh property, the latter will not pass. *In re Lane*; *Luard v. Lane*, 28 W. R. 764; 14 Ch. D. 856.

11. If the testator sells the specific thing and buys <sup>Confirmation by codicil.</sup> another thing closely resembling the former, the subsequent confirmation of the will by a codicil will not have the effect of passing the fresh acquisition if the description in the will is not accurately appropriate to it. *Pattison v. Pattison*, 1 M. & K. 12; *Macdonald v. Irvine*, 8 Ch. D. 101; see *Pilkingtton's Trusts*, 6 N. R. 246; and see the Chapter on Ademption, *post*, p. 121.

## CHAPTER XV.

## SPECIFIC, GENERAL, AND DEMONSTRATIVE LEGACIES.

General  
and specific  
legacies  
disting-  
guished.

IN the case of bequests of personalty it is often a question of difficulty whether a legacy is general or specific. A general legacy is a legacy not of any particular thing, but of something which is to be provided out of the testator's general estate. If a particular fund is made primarily liable the legacy is demonstrative, but does not fail by the failure of the particular fund. On the other hand, a specific legacy is a gift of a severed or distinguished part of the testator's property. It does not abate till after the general legacies are exhausted, but it is liable to ademption by the testator in his lifetime.

The most common, though not the only kind of specific legacy, is where the testator gives something which he possesses at the date of the will.

In these cases there must be on the face of the will enough to show that the testator is referring to something actually existing at the time.

Legacy of  
stock is not  
specific.

Thus a mere legacy of stock in round numbers, though the testator may possess the exact amount of stock, is not specific. *Partridge v. Partridge*, 9 Mod. 269; *Ca. t. Talb.* 226; *Simmons v. Vallance*, 4 B. C. C. 345; *Wilson v. Brownsmith*, 9 Ves. 180.

Nor of  
money in  
stock.

Similarly a bequest of 5000*l.* in the South Sea Company's Stock is general, though the testator may have the exact amount at the date of his will. *Purse v. Snaplin*, 1 Atk. 415; *Bronsdon v. Winter*, Amb. 57; *Bishop of Peterborough v. Mortlock*, 1 Bro. C. C. 565; *Webster v. Hale*,

8 Ves. 410; *Robinson v. Addison*, 2 B. 515; *Macdonald v. Irvine*, 8 Ch. D. 101; see *Page v. Young*, 19 Eq. 501, where a gift of "the interest of £4500l., money in the funds," was held specific.

As to whether the gift is of so much money to be invested in stock, or of stock of that value, see *Allan v. Kelly*, 7 W. R. 139.

But though the actual gift may not contain anything to show that it is specific, it may appear from the rest of the will that it is so.

A direction to transfer a certain amount of stock, or to pay it as soon as possible, will not make the legacy specific. *Sibley v. Perry*, 7 Ves. 522, 529; *Webster v. Hale*, 8 Ves. 410. Nor of stock to be transferred.

But a gift of stock generally to trustees on trust to sell, shows that the testator referred to specific stock. *Ashton v. Ashton*, Ca. t. Talb. 152; 3 P. W. 384. Gift on trust to sell is specific.

So where a testator, having given legacies of stock generally, then gives the rest of the stock "standing in my name," the earlier legacies must be specific. *Sleech v. Thorington*, 2 Ves. Sen. 560; see *Millard v. Bailey*, L. R. 1 Eq. 378. Gift of rest of my stock makes previous gifts of stock specific.

A direction that if the testator should not have sufficient stock standing in his name to answer the legacies of stock previously given, the executors should purchase sufficient to make up the deficiency, shows that the testator meant to give something in existence at the time. *Townsend v. Martin*, 7 Ha. 471; *Fountaine v. Tyler*, 9 Pr. 94; *Queen's Coll. v. Sutton*, 12 Sim. 521. Direction to purchase if the testator should not have sufficient stock to answer legacies of stock previously given.

The same is the case with a gift of 4000l., capital stock, in the 3 per cent. Consolidated Bank Annuities, "or in whatsoever of the Government funds the same should be found invested." *Hosking v. Nicholls*, 1 Y. & C. C. 478.

If the legacy is not of stock in round numbers, but for instance of 2702l. 3s., Bank Annuities, and the testator has Legacy of stock not in round

numbers  
where the  
testator  
has the  
exact  
amount.

Gift of  
"my"  
stock.

Effect of  
Wills Act.

the exact amount, it would seem the argument in favour of specific gift is much stronger. *Jeffreys v. Jeffreys*, 3 Atk. 120; see *Robinson v. Addison*, 2 B. 515.

A gift of "my" stock is specific. *Ashburner v. Maguire*, 2 B. C. C. 108; *Miller v. Little*, 2 B. 259.

The effect of the Wills Act upon such a gift is to leave it specific, though it includes all the stock of the particular description belonging to the testator at his death. *Lady Langdale v. Briggs*, 8 D. M. & G. 391; *Trinder v. Trinder*, L. R. 1 Eq. 695; *Bothamley v. Sherson*, 20 Eq. 304.

It will not include stock which the testator has directed his brokers to purchase, but which is not in fact purchased till after his death. *Thomas v. Thomas*, 27 B. 537.

Gift of  
part of  
specific  
fund.

A gift of a part of a specific fund is specific. *Ford v. Fleming*, 1 Eq. Ca. Ab. 302, pl. 3; 2 P. W. 469; *Nelson v. Carter*, 5 Sim. 530; *Oliver v. Oliver*, 11 Eq. 506.

So, too, a gift of a specific thing to be sold and divided in definite shares among several persons is a gift of specific legacies. *Page v. Leapingwell*, 13 Ves. 463; *Jeffrey's Trusts*, L. R. 2 Eq. 68.

Gift of  
money out  
of money.

Similarly a gift of money "out of" specific money, or of stock "out of" specific stock, is specific; as, for instance, money out of the dividends of stock, or money out of money invested in stock. *Drinkwater v. Falconer*, 2 Ves. Sen. 623; *Morley v. Bird*, 3 Ves. 628; *Hosking v. Nicholls*, 1 Y. & C. Ch. 478; *Badrick v. Stevens*, 3 B. C. C. 431; *Mullins v. Smith*, 1 Dr. & Sm. 204.

Money out  
of stock.

On the other hand a gift of money out of stock is not specific, but demonstrative. *Kirby v. Potter*, 4 Ves. 748; *Deane v. Test*, 9 Ves. 146.

Independ-  
ent gift  
followed  
by a direc-  
tion to pay  
out of a  
certain  
fund.

If there is an independent gift of money, followed by a direction to pay it out of certain specific moneys, the legacy is demonstrative. *Roberts v. Pocock*, 4 Ves. 150; *Acton v. Acton*, 1 Mer. 178.

Similarly a gift of "5000*l.* or 50,000 rupees now vested

in Company's bonds," is demonstrative. *Gillaume v. Adderley*, 15 Ves. 384.

Where the gift is not "out of" but "of" only, as 100*l.* Gift of <sup>£100 of</sup> my funded property, it is more difficult to decide under <sup>my funded</sup> which of the two last heads the gift falls. It seems, however, that if the testator estimates his stock in money, a gift of 100*l.* of my stock is specific. *Davies v. Fowler*, 16 Eq. 308. See *Brennan v. Brennan*, I. R. 2 Eq. 321.

But if he does not, and gives merely a gift of 100*l.* of my funded property, it is equivalent to a gift of money out of stock, and is therefore not specific. *Lambert v. Lambert*, 11 Ves. 607.

In some cases a difficulty may arise whether the testator meant money out of money or money out of stock. Whether a gift is of money out of money, or of money out of stock.

It is clear that a gift of "2000*l.* Long Annuities now standing in my name" is specific, though the testator may only have had a much smaller sum. *Gordon v. Duff*, 28 B. 519; 3 D. F. & J. 662.

Whether it is a gift of Long Annuities to the amount of 2000*l.* a year or of 2000*l.* in gross seems doubtful, but probably this would depend on the state of the testator's property.

But if the gift is of "50*l.* of Bank Long Annuities Stock standing in my name," as such stock has no existence, and the gift might equally well be of a lump sum of £50*l.*, or of 50*l.* per annum, it is necessary to refer to the state of the testator's property to discover what he may have meant, and whether the gift is of 50*l.* per annum Long Annuities, or of the sum of 50*l.* to be paid out of Long Annuities. If the property is insufficient to satisfy the legacies, if construed as legacies of so much per annum Long Annuities, the legacies will be demonstrative legacies of so much money out of Long Annuities. *Boys v. Williams*, 3 Sim. 563; 2 R. & M. 688. See *A.-G. v. Grote*, 3 Mer. 316; 2 R. & M. 699; *Colpoys v. Colpoys*, Jac. 451, and *Fonnereau*

v. *Poyntz*, 1 B. C. C. 471, as explained by Lord Eldon, 6 Ves. 400.

Legacy  
may be  
specific yet  
not subject  
to ademp-  
tion.

It has been said that a specific legacy must be liable to ademption, and that therefore there could not be a specific legacy of a thing which the testator had not at the date of the will. See *Parrott v. Worsfold*, 1 J. & W. 594.

But it is now clear that a testator may make a specific gift of a thing of which he contemplates the acquisition, as for instance of the stock he may die possessed of. *Fountaine v. Tyler*, 9 Pr. 94; *Stewart v. Denton*, 4 Dougl. 219; 2 Chitty, 456; *Stephenson v. Dowson*, 3 B. 342; *Queen's Coll. v. Sutton*, 12 Sim. 521.

Whether a  
gift of a  
sum "in-  
vested" in  
a par-  
ticular way  
is specific.

Whether the gift of a sum "invested" in a particular way is specific or not, depends on the question whether the testator meant the legatee to have the sum however invested, or whether the actual investment is the important part of the description.

Thus a gift of "the" 7000*l.* out on mortgage is clearly specific. *Gardner v. Hatton*, 6 Sim. 93.

A bequest of a sum of money described as "now" invested in a certain way must probably be considered specific. *Harrison v. Jackson*, 7 Ch. D. 339, where *Le Grice v. Finch*, 3 Mer. 50, is disapproved. See *Sparrow v. Josselyn*, 16 B. 135.

A gift of "3000*l.* invested in Indian security" has upon the general language of the will been held to be demonstrative. *Mytton v. Mytton*, 19 Eq. 30; see *Bevan v. A.-G.*, 4 Giff. 361; 2 N. R. 52.

But if the gift is of 300*l.*, or *thereabouts*, invested by the testatrix in a certain way, the words "or thereabouts" show that the sum is immaterial, and that the investment is the important part of the gift. *Kermode v. Macdonald*, L. R. 1 Eq. 457; *ib.* 3 Ch. 584.

The following gifts have been held to be specific:

Examples

A gift of a particular debt, or of the money due on a

particular security; as for instance of "my mortgage," or of specific gifts.  
 "the money now owing to me from A." *Innes v. Johnson*,  
 4 Ves. 568; *Sidebotham v. Watson*, 11 Ha. 170; *Ellis v. Walker*, Amb. 309; *Smallman v. Goodden*, 1 Cox, 329;  
*Gardner v. Hatton*, 6 Sim. 93. See *Sidney v. Sidney*,  
 17 Eq. 65.

A gift of the interest of money on a particular security.  
*Ashburner v. M'Guire*, 2 B. C. C. 108.

A gift of a sum of money "which" is secured in a particular way. *Chaworth v. Beech*, 4 Ves. 556; *Gillaume v. Adderley*, 15 Ves. 384; *Davies v. Morgan*, 1 B. 405.

A gift of money described as "being" on a particular security. *Nelson v. Carter*, 5 Sim. 530; *Ford v. Fleming*, 2 P. W. 469; S. C. 1 Eq. Cas. Ab. 302, pl. 3. See *Sparrow v. Josselyn*, 16 B. 135; *Smith v. Pybus*, 9 Ves. 566.

A legacy directed to be paid out of the amount of a debt due to the testator is a demonstrative legacy. *Vickers v. Pound*, 6 W. R. 580; 4 Jur. N. S. 543; 6 H. L. 885.

#### WHETHER A GIFT IS OF A SPECIFIC OR AN ALIQUOT PART OF FUND.

A gift of a definite sum, part of a specific fund, is *primæ facie* a gift of that precise sum, whether the fund turns out more or less, and not of an aliquot part of the fund. *Smith v. Fitzgerald*, 3 V. & B. 2; *Booth v. Alington*, 6 D. M. & G. 613. See *Eales v. Drake*, 1 Ch. D. 217. Whether a gift is of a specific or aliquot part of a fund.

The testator may, however, show an intention that the legatees were to take aliquot parts of the fund. See *Chambers v. Chambers*, Mos. 333; *Cordell v. Noden*, 2 Vern. 148.

Upon similar principles, where a fund subject to a special power is appointed to objects and non-objects, the objects take only the shares they would have taken supposing the whole appointment good, and the rest goes

as in default of appointment. *In re Farncombe's Trusts*, 9 Ch. D. 652.

#### LEGACIES CONNECTED WITH LAND.

Devise of land is specific whether residuary or not.

A devise of lands, whether by specific description or by residuary devise, is specific. *Hensman v. Fryer*, L. R. 3 Ch. 420; *Lancefield v. Iggulden*, 10 Ch. 136.

Devise on trust to sell and divide.

A devise of land to be sold and divided among certain persons makes them specific legatees. *Page v. Leapingwell*, 18 Ves. 463; *Newbold v. Roadknight*, 1 R. & M. 677.

Gift of rent-charge.

The gift of a rent-charge or annuity to be paid out of land with powers of distress is specific. *Long v. Short*, 1 P. W. 403; *Davenhill v. Fletcher*, Amb. 244; *Creed v. Creed*, 11 C. & F. 491. See *Poole v. Heron*, 42 L. J. Ch. 348.

Of annual sum to be paid out of land.

But a mere gift of an annual sum or of a legacy to be paid out of real estate, will not be specific. *Mann v. Copland*, 2 Mad. 223; *Fowler v. Willoughby*, 2 S. & St. 354; *Colville v. Middleton*, 3 B. 570.

Legacy with mere charge on land.

Nor will a gift of a legacy or an annuity with a mere charge on land be specific. *Wilcox v. Rhodes*, 2 Russ. 452; *Davies v. Ashford*, 15 Sim. 42; *Paget v. Huish*, 1 H. & M. 663.

Trust to raise a sum out of land.

But a trust to raise a sum of money out of land, which sum is then given, is a specific legacy. *Welby v. Rockcliffe*, 1 R. & M. 571; *Dickin v. Edwards*, 4 Ha. 273.

So, too, a direction to pay a sum out of land, the only gift being in the direction to pay, is specific. *Spurway v. Glyn*, 9 Ves. 483.

Effect of directions in the will on legacies in themselves specific.

In such a case the fact that the personalty is given after payment of legacies will not make the gift of a sum out of the proceeds of sale of realty demonstrative. *Rickets v. Ladley*, 3 Russ. 418.

Though, on the other hand, where a testatrix gave her real and personal estate on trust to pay the legacies there-



inafter given, a subsequent gift out of the proceeds of sale of realty was held demonstrative. *Hodges v. Grant*, 4 Eq. 140.

And where a legacy was given out of a fund which was not available till the death of A., but there was a direction that it was to be paid with the other legacies, it was held demonstrative. *Williams v. Hughes*, 24 B. 474.

#### WHETHER A GIFT IS SPECIFIC OR RESIDUARY.

A gift of the whole of the testator's personal estate may be specific. *Powell v. Riley*, 12 Eq. 175; *Roffey v. Early*, 42 L. J. Ch. 472. See the cases cited under the head of Exoneration of Personality. Whether a gift is specific or residuary.

A mere enumeration of specific things in a residuary bequest will not make the gift of those things specific. *Taylor v. Taylor*, 6 Sim. 246; *Sutherland v. Cooke*, 1 Coll. 498; *Fielding v. Preston*, 1 De G. & J. 438. Enumeration of specific things.

The cases in which it has been held that as between tenant for life and remainderman of a residue the fact of specific enumeration of certain things is a strong argument in favour of specific enjoyment by the former, are no authorities on the question whether the gift of those things is specific in the sense here discussed, though where the tenant for life has not been held entitled to specific enjoyment, the things specifically mentioned are *a fortiori* not specific legacies. See this distinction well illustrated in *Fielding v. Preston*, 1 De G. & J. 438; see *post*, p. 199.

A direction that certain funds are in certain events to fall into the residue will not make the gift of those funds specific. *Lynes' Estate*, 8 Eq. 482.

A gift of residue including certain specified property will not make the gift of that property specific. *In re Tootal's Estate*, 2 Ch. D. 628; *Macdonald v. Irvine*, 8 Ch. D. 101.

Effect of words "as well as," "together with," &c.

If the specific things enumerated in the residuary gift are distinguished from the residue by such words as "as well as," or "together with," or "and also," the gift of them is specific. *Clarke v. Butler*, 1 Mer. 304; *Hill v. Hill*, 11 Jur. N. S. 806; *Langdale v. Esmonde*, I. R. 4 Eq. 576; *Fitzwilliam v. Kelly*, 10 Ha. 266.

Possibly if the enumeration of specific things comes after the gift of the residue, the same result may follow. *Bethune v. Kennedy*, 1 M. & Cr. 114; *Mills v. Brown*, 21 B. 1.

On the other hand a residue given "together with" certain specified property will not make the gift of that property specific, if its mention can be accounted for on the ground that the testator wished to except it from another gift in the will. *Fairer v. Park*, 3 Ch. D. 309.

The subject of residuary gifts will be found discussed *post*, Ch. XX., p. 182.

#### WHETHER A GIFT OF THE REST OR RESIDUE OF A SPECIFIED FUND IS SPECIFIC.

Whether a gift of the residue of a fund is specific.

When a testator disposes of parts of a specific fund, which he estimates at a certain amount, and then disposes of the residue, and the fund turns out to be less than the estimated amount, the question arises whether the gift of residue was intended to be specific or not. In the former case, all the beneficiaries abate proportionately; in the latter, the loss must, in the first instance, be borne by the residuary legatee.

Where a testator gives the residue of a specific fund and estimates that residue in money, the gift of the residue is specific. *Haslewood v. Green*, 28 B. 1; *Walpole v. Apthorp*, 4 Eq. 37.

So, too, where a testator estimates a specific fund in money and gives definite portions of it, a gift of the rest is as specific as if he had stated it in figures. *Page v.*

*Leapingwell*, 18 Ves. 463; *Walpole v. Apthorp*, 4 Eq. 37; *Miller v. Huddleston*, 6 Eq. 65; *Elwes v. Causton*, 30 B. 554; *Wright v. Weston*, 26 B. 429.

But if the fund is given subject to debts, the gift of the residue will not be specific. *Harley v. Moon*, 1 Dr. & S. 623; *Baker v. Farmer*, 3 Ch. 537.

So, too, though the testator estimates the fund in money, if the residue is given subject to or after payment of specific gifts, the gift of the residue is not specific, but will carry everything undisposed of, by reason of lapse or otherwise. *Carter v. Taggart*, 16 Sim. 423; *Harries' Trust*, Jo. 199; but see *Miller v. Huddleston*, 6 Eq. 65.

So, if the fund is estimated in figures, but the testator shows that he considers it fluctuating in amount by adding "or other the stock, funds, or securities of which the same may for the time being consist," the gift of the residue is not specific. *De Lisle v. Hodges*, 17 Eq. 440.

And though the fund is in fact definite in amount, if the testator merely describes it generally, without estimating it in figures, the gift of the residue is not specific. *Petre v. Petre*, 14 B. 197; *Vivian v. Mortlock*, 21 B. 252.

See the chapter on Residuary Bequests, p. 187.

## CHAPTER XVI.

## CUMULATIVE AND SUBSTITUTIONAL LEGACIES.

Legacies  
by same  
instrument  
of equal  
amount;

I. LEGACIES of equal amount given by the same instrument are merely repetitions. *Holford v. Wood*, 4 Ves. 75; *Manning v. Thesiger*, 3 M. & K. 29; *Brine v. Ferrier*, 7 Sim. 549; *Early v. Benbow*, 2 Coll. 342; *Early v. Middleton*, 14 B. 453.

But there may be an intention to give both. *Barkenshaw v. Hodge*, 22 W. R. 484, where the gift was to trustees, and the legacies were introduced by the words "upon trust to pay," and "upon further trust to pay," &c.

Parol evidence would be admissible to show that the testator meant the legatee to have both legacies, such evidence being in support of the *prima facie* meaning of the instrument. See *Hurst v. Beach*, 5 Mad. 351; *Hall v. Hill*, 1 Dr. & War. 94.

of unequal  
amount.

If the legacies are not equal the legatee is entitled to both. *Yockney v. Hansard*, 3 Ha. 622; *Curry v. Pile*, 2 B. C. C. 225; *Baylee v. Quin*, 2 Dr. & War. 116; *Adnam v. Cole*, 6 B. 353.

The rules with regard to cumulative legacies do not apply to the case of a pecuniary gift and a residue given to the same person. In such a case the legatee is entitled to both. *Kirkpatrick v. Bedford*, 4 App. C. 96.

Legacies  
by dif-  
ferent in-  
struments.

II. Legacies of equal, less, or greater amount, given by different instruments, as by will and codicil to the same person, are *prima facie* cumulative. *Hooley v. Hatton*, 1 B. C. C. 390 n.; *Lee v. Pain*, 4 Ha. 201, 216; *Roch v.*

*Cullen*, 6 Ha. 531; *Cresswell v. Cresswell*, 6 Eq. 69; *Wilson v. O'Leary*, 12 Eq. 525; 7 Ch. 448; *Walsh v. Walsh*, I. R. 4. Eq. 396.

Bequests of a share of residue by will and of a pecuniary legacy by a codicil are, of course, cumulative. *Gordon v. Anderson*, 4 Jur. N. S. 1097; *Ledger v. Hooker*, 18 Jur. 481.

It makes no difference that the codicil recites the gift by will. *Guy v. Sharp*, 1 M. & K. 589.

The fact that some legacies in the codicil are expressed to be in addition affords an argument that the others are substitutional, but is not conclusive. *Hooley v. Hatton*, 1 B. C. C. 390 n.; *Allen v. Callow*, 3 Ves. 289; *Mackenzie v. Mackenzie*, 2 Russ. 272; *Wray v. Field*, 2 Russ. 257; 6 Mad. 300; *Barclay v. Wainwright*, 3 Ves. 462.

The fact that a legacy given by a codicil is expressed to be in addition to a legacy given by the will does not show that it is not also in addition to a legacy by a prior codicil. *Spire v. Smith*, 1 B. 419; *Watson v. Reed*, 5 Sim. 431; see *Sawrey v. Rumney*, 5 De G. & Sm. 698.

III. It may, however, appear that the gift by the later instrument is intended to be substitutional. This may be shown:

1. By the form of the second instrument.

a. If the instrument by which the second gift is made is not a codicil, but is described as a last will and testament, the presumption is strong that it was intended to be in substitution so far as it goes for the prior instrument. *Jackson v. Jackson*, 2 Cox, 35; *Kidd v. North*, 14 Sim. 463; 2 Ph. 91; *Tuckey v. Henderson*, 33 B. 174.

b. If the additional instrument recites that the testator has not time to alter his will, legacies given by it will be substitutional. *Russell v. Dickson*, 4 H. L. 293.

c. If the additional instrument is treated as explanatory of and to be incorporated into the will, the case may be

Legacies by different instruments will be substitutional—  
if the instruments themselves are substitutional,

brought within the rule as to additional gifts in the same instrument. *Duke of St. Albans v. Beauclerk*, 2 Atk. 636; *Fraser v. Byng*, 1 R. & M. 90.

And in the same way several testamentary papers may be so connected together as to be in fact one instrument. *Brine v. Ferrier*, 7 Sim. 549.

The same will be the case where there is a gift to a person with a different gift written in the margin of the will. *Martin v. Drinkwater*, 2 B. 215.

or mere  
repetitions  
of each  
other,

## 2. From the contents of the second paper.

For instance, where the second instrument is not a codicil but a testamentary paper, and in effect makes the same dispositions as a prior testamentary paper. *Gillespie v. Alexander*, 2 S. & St. 145; *A.-G. v. Harley*, 4 Mad. 263; *Hemming v. Gurney*, 2 S. & St. 311; 1 Bl. N. S. 479.

So one codicil may appear to be a mere repetition of another. If, for instance, both are of the same date and contain the same provisions in all respects. *Whyte v. Whyte*, 17 Eq. 50.

So if, though not of the same date, the legatees are the same, and certain specific legacies, as well as the residue, are given by both. *Duke of St. Albans v. Beauclerk*, 2 Atk. 636; see *Coot v. Boyd*, 2 B. C. C. 521, and *Campbell v. Earl of Radnor*, 1 B. C. C. 271; see *Roxburgh v. Fuller*, 13 W. R. 39.

Evidence is admissible to show that two codicils of different dates, but containing the same dispositions, were executed only as duplicates. *Hubbard v. Alexander*, 3 Ch. D. 738.

if the  
terms of  
the second  
gift show  
that it was  
meant to  
be substit-  
utional.

## 3. It may appear from the character of the second gift itself that it is meant to be substitutional.

a. If the second gift only adapts the bounty to circumstances that have happened; as, for instance, the death of prior legatees. *Barclay v. Wainwright*, 3 Ves. 462; *Allen v. Callow*, 3 Ves. 289; *Osborne v. Duke of Leeds*, 5 Ves. 369.

b. If the second gift can be looked upon as explanatory of the prior gift. *Moggridge v. Thackwell*, 1 Ves. jun. 473.

c. If by a codicil the testator revokes a portion of a prior gift, and then repeats the rest, so that the repetition may be explained as *ex abundanti cautela*. *Benyon v. Benyon*, 17 Ves. 34; *Hinchcliffe v. Hinchcliffe*, 2 Dr. & S. 96.

d. If the second gift is coupled with a gift of some specific thing already given, this shows it to be substitutional. *Currie v. Pye*, 17 Ves. 462; see *Lord Mayor of London v. Russell*, Finch, 290; explained 6 Ir. Ch. 131.

e. And generally it seems that a difference in the way in which the two gifts are given is in favour of their being cumulative. *Hodges v. Peacock*, 3 Ves. 735; *Les v. Pain*, 4 Ha. 201. Though, on the other hand, if the two gifts are of the same amount, but given to different trustees, the argument is the other way. *Benyon v. Benyon*, 17 Ves. 34.

f. The testator may show by a reference to a gift in one codicil as a "sufficient" provision that the gift so given was all the legatee was intended to have. *Robley v. Robley*, 2 B. 95.

IV. Gifts by different instruments of the same amount and expressed to be given from the same motive are substitutional. *Benyon v. Benyon*, 17 Ves. 34.

Gifts of the same amount given from the same motive are substitutional.

It must, however, be clear that the testator is expressing a motive and not merely giving a description; thus, in the case of gifts of equal amount to a "servant," the term servant is merely descriptive. *Roch v. Cullen*, 6 Ha. 531; *Suisse v. Lowther*, 2 Ha. 424; *Wilson v. O'Leary*, 12 Eq. 522; 7 Ch. 448.

If, however, the gifts are not of the same amount they are cumulative. *Hurst v. Beach*, 5 Mad. 352.

V. Additional legacies are subject to the same incidents as the original legacy.

Additional and substitutional gifts are subject to

A gift in addition to or in lieu of a previous gift to the

the same incidents as the original gift.

same legatee is subject to the same conditions as the previous gift with respect to vesting, separate estate, the fund out of which it is payable, freedom from legacy duty, and provisions against lapse. *Leacroft v. Maynard*, 1 Ves. jun. 279; 3 B. C. C. 233; *Crowder v. Clowes*, 2 Ves. jun. 449; *Day v. Croft*, 4 B. 561; *Duncan v. Duncan*, 27 B. 392; *Earl of Shaftesbury v. Duke of Marlborough*, 7 Sim. 237; *Bristow v. Bristow*, 5 B. 289; *Cooper v. Day*, 3 Mer. 154; *Fisher v. Brierley*, 30 B. 265; *In re Wight*; *Knowles v. Sadler*, W. N. 1879, 20.

It makes no difference that the legacy is not expressed to be in addition to the previous gift. *Johnson v. Lord Harrowby*, Johns. 425; 1 D. F. & J. 183.

The rule does not apply where a legacy is given to a person in lieu of a legacy to another legatee who has predeceased the testator. *Chatteris v. Young*, 2 Russ. 184.

Nor does it apply where the condition in question is limited by the will to legacies "hereinafter" given, and the additional legacy is given by a codicil. *Bonner v. Bonner*, 13 Ves. 379; *Strong v. Ingram*, 6 Sim. 197.

It is not quite clear whether an additional or substitutional gift will be subject to the same executory gifts over as the original gift; it seems, however, that it will not. *Crowder v. Clowes*, 2 Ves. jun. 449; *Alexander v. Alexander*, 5 B. 518; see *Donnellan v. O'Neill*, 1 R. 5 Eq. 523.

An additional legacy given in terms which would give an absolute interest is not subject to limitations of the prior gift, which would cut it down to a life interest. *Haley v. Bannister*, 23 B. 336; *More's Trust*, 10 Ha. 171; *Mann v. Fuller*, Kay, 624; *Hill v. Jones*, 37 L. J. Ch. 465; see *Cookson v. Hancock*, 2 M. & Cr. 606; *Hargreaves v. Pennington*, 12 W. R. 1047.



## CHAPTER XVII.

THE INCIDENTS ATTACHING TO SPECIFIC AND  
GENERAL LEGACIES.

## I. ADEMPMENT.

A SPECIFIC legacy is adeemed if it is afterwards converted by the testator into something else. *Ashburner v. McGuire*, 2 Br. C. C. 108. A specific legacy is adeemed if converted by the testator,

The conversion must be complete in the lifetime of the testator. A direction to sell not carried out till after the testator's death will not effect ademption. *Harrison v. Asher*, 2 De G. & S. 436.

A charge upon a specific bequest is gone if the specific bequest is adeemed. *Couper v. Mantell*, 22 B. 223.

To effect ademption it is not necessary that the conversion should be the act of the testator. It is sufficient if the property is converted by some duly constituted authority, such as an order in lunacy. *Shaftsbury v. Shaftsbury*, 2 Ver. 747; *Jones v. Green*, 5 Eq. 555. or a proper authority,

Destruction of the property by *vis major*, such as the loss of a ship, has the same effect. *Durrant v. Friend*, 5 De G. & Sm. 343. *vis major*.

There will be no ademption where the specific thing has been converted without authority. *Basan v. Brandon*, 8 Sim. 171; *Taylor v. Taylor*, 10 Ha. 475; *Jenkins v. Jones*, L. R. 2 Eq. 323; see *Browne v. Groombridge*, 4 Mad. 495. But not by improper conversion.

A gift of specific stock standing in the names of trustees is adeemed by a change of investment. *Harrison v. Jackson*, 7 Ch. D. 339.

Mere transfer from trustees to testator will not adeem.

But a mere transfer of a thing specifically given from trustees to the testator will not be an ademption. *Dingwell v. Askew*, 1 Cox, 427; see *Amb.* 260; 3 B. C. C. 416; *Clough v. Clough*, 3 M. & K. 296; *Jones v. Southall*, 32 B. 31.

Nor will a formal change.

Nor will a change made in it which leaves the thing to all intents the same as it was before; as, for instance, the conversion of shares into stock by a resolution of the company. *Oakes v. Oakes*, 9 Ha. 666; *Pilkington's Trusts*, 6 N. R. 246. *In re Loveman*; *Watson v. Watson*, W. N. 1879, 95; see *Partridge v. Partridge*, Cas. t. Talb. 226; *In re Lane*; *Luard v. Lane*, 14 Ch. D. 856.

Bequests of share under will.

Upon the question whether a bequest of a share, to which the testator is entitled under the will of another person, would be adeemed if the share is paid to the testator after the date of his will, it seems that if the testator describes the share in such words as to show that he intends to give only a chose in action, the gift will be adeemed by the receipt of the share. See *Harrison v. Jackson*, 7 Ch. D. 339, where *Clark v. Browne*, 2 Sm. & G. 524, is disapproved.

On the other hand, if the description employed by the testator does not refer to the share as a chose in action, the gift will not be adeemed, merely because the testator has received the share, if he invests it and keeps it apart from the rest of his property. *Lee v. Lee*, 27 L. J. Ch. 824; *Morgan v. Thomas*, 6 Ch. D. 176; see *Moore v. Moore*, 29 B. 496.

Effect of change of security.

And it would seem that a bequest of certain trust funds "and the securities upon which they may be invested" would not be adeemed by a mere change of security, though it will if the testator receives the money and lends it on security for his own purposes. *Jones v. Southall*, 32 B. 31.

Where the donee of a general power appoints a fund of Appointment of personality by a specific description the appointment is not adeemed by a subsequent change of investment. *In re Johnstone's Settlement*, 14 Ch. D. 162.

As to whether an appointment of real estate under a of realty. power is adeemed by the subsequent sale of the real estate under provisions contained in the settlement creating the power, see *Gale v. Gale*, 21 B. 349; *Blake v. Blake*, 49 L. J. Ch. 393; 28 W. R. 647; 15 Ch. D. 481.

The confirmation of a will by a codicil will not revive Confirmation of a will does not revive adeemed legacy. a legacy which has been adeemed in the meantime. *Drinkwater v. Falconer*, 2 Ves. sen. 626; *Monck v. Monck*, 1 Ba. & B. 306; *Cowper v. Mantell*, 22 B. 223; *Hopwood v. Hopwood*, 7 H. L. 728; see *ante*, p. 103.

In the same way the specific gift of a debt due to the Gift of a debt is adeemed by payment to the testator. testator, and afterwards received in whole or part by him, whether the debtor pays it voluntarily or not, is adeemed *pro tanto*. *Ashburner v. McGuire*, 2 B. C. C. 108; *Fryer v. Morris*, 9 Ves. 360; *Humphries v. Humphries*, 2 Cox, 185; *Makeown v. Ardagh*, 1 R. 10 Eq. 445; *Aston v. Wood*, 43 L. J. Ch. 715; *In re Bridle*, 4 C. P. D. 336.

It is immaterial that the amount of the debt is placed by the testator to a separate account. *In re Bridle, supra*.

Where a particular sum owing to the testator is be- Effect where a fresh debt is incurred. queathed and afterwards received by him, a fresh debt subsequently incurred by the same debtor will not pass, at any rate, if the sums are not precisely the same. *Gardner v. Hatton*, 6 Sim. 93; *Sidney v. Sidney*, 17 Eq. 65.

Where things in a particular place, such as a house, are Gift of things in a house when adeemed. given and are afterwards removed to another place, the question is, whether the place is a substantive part of the bequest or whether it is merely descriptive of the things the testator refers to.

In the latter case the removal of the things to another Removal is immaterial if the place place is immaterial. *Cunningham v. Ross*, 2 Cas. t. Lee,

is merely  
descrip-  
tive.

272; *Norris v. Norris*, 2 Coll. 719; *Blagrove v. Coore*, 27 B. 138; *Norreys v. Franks*, I. R. 9 Eq. 18.

Similarly a bequest of furniture in a house will pass furniture intended to be placed there. *Rawlinson v. Rawlinson*, 3 Ch. D. 302.

*Secus* if  
the inten-  
tion is to  
give only  
such things  
as may be  
in the  
place.

If, however, the bequest of the things is connected with the enjoyment of the house, both being given to the legatee; or if the gift is of such furniture as may be in a particular place at the testator's decease, a permanent removal works an ademption. *Colleton v. Garth*, 6 Sim. 19; *Shaftsbury v. Shaftsbury*, 2 Vern. 747; *Heseltine v. Heseltine*, 3 Mad. 276; *Green v. Symonds*, 1 B. C. C. 129 n.; *Spencer v. Spencer*, 21 B. 548.

Temporary  
removal  
will not  
adeem.

But a removal for a temporary purpose will not have this effect. *Domville v. Baker*, 32 B. 604; *Chapman v. Hart*, 1 Ves. sen. 271; *Norreys v. Franks*, I. R. 9 Eq. 18; *Land v. Devaynes*, 4 B. C. C. 537; *Lord Brooke v. Earl of Warwick*, 2 De G. & S. 425.

## II. CHANGE OF INTEREST OF TESTATOR.

Effect of  
change in  
the tes-  
tator's in-  
terest after  
the date of  
the will.

A somewhat different question arises where the nature of the testator's interest in the subject matter of a bequest alters between the date of the will and his death; if, for instance, the testator subsequently acquires the reversion of leaseholds given by his will.

Accept-  
ance of a  
new lease.

Before the Wills Act a specific bequest of a lease, unless the testator being *cestui que trust* gave his interest in the lease which includes the right to the benefit of a renewal by the trustee, or expressly gave his future interest, was adeemed by the acceptance of a new lease or the acquisition of the reversion. *Carte v. Carte*, 3 Atk. 174; *James v. Dean*, 11 Ves. 383; 15 Ves. 238; *Marwood v. Turner*, 3 P. Wms. 163; *Abney v. Miller*, 2 Atk. 593; *Capel v. Girdler*, 9 Ves. 509; *Slatter v. Noton*, 16 Ves. 197.

In the same way, the purchase of the equity of redemption revoked a devise of the mortgaged estate. *Strode v. Lady Falkland*, 2 Vern. 621; *Yardley v. Holland*, 20 Eq. 428.

And a general gift of lands or a house in which the testator had a chattel interest was *prima facie* a gift of that interest and subject to ademption in the same way. *Rudstone v. Anderson*, 2 Ves. 418; *Hone v. Medcraft*, 1 B. C. C. 261; *Coppin v. Fernyhough*, 2 B. C. C. 291; *Colegrave v. Manby*, 6 Mad. 72; 2 Russ. 238.

It seems, however, that the 24th section of the Wills Act applies to such a case, and since that statute the subsequent acquisition of the reversion will not be an ademption of the gift. *Struthers v. Struthers*, 5 W. R. 802; *Cox v. Bennett*, 6 Eq. 422; not following *Emuss v. Smith*, 2 De G. & Sm. 722; and see *Miles v. Miles*, L. R. 1 Eq. 462; *Wedgwood v. Denton*, 12 Eq. 290; *Leckey v. Watson*, I. R. 7 C. L. 157; *Saxton v. Saxton*, 13 Ch. D. 359.

Effect of  
the Wills  
Act.

### III. RIGHT OF RETAINER.

It seems doubtful whether a specific legacy can be subject to the executor's right of retainer for a debt due from the legatee to the estate. *Harvey v. Palmer*, 4 De G. & S. 425.

Right of  
retainer  
against  
specific  
legatee.

In the case of a general legacy the executor is entitled to retain so much of the legacy as may be sufficient to pay a debt due to the testator from the legatee, even though the debt may be barred by statute. *Courtenay v. Williams*, 3 H. 539; *In re Cordwell's Estate*; *White v. Cordwell*, 20 Eq. 644.

Against  
general  
legacy.

Costs of administration directed to be paid by a legatee are within the same rule. *In re Knapman's Estate*; *Knapman v. Wreford*, 49 L. J. Ch. 716.

In the case of a legatee who becomes bankrupt after the testator's death, the executor is, it seems, entitled to retain the debt. But if he proves in the bankruptcy the right of retainer is gone. *Stammers v. Elliott*, 3 Ch. 195; *Armstrong v. Armstrong*, 12 Eq. 614.

Bankrupt  
legatee.

In the case of a legatee bankrupt at the death of the testator there is no right to retain the debt out of the legacy, since there was never a time at which the same person was entitled to receive the legacy and liable to pay the whole debt. Dividends payable under the bankruptcy, if any have been declared, may be retained. *Cherry v. Boulthbee*, 2 Kee. 319; 4 M. & Cr. 442; *In re Hodgson*; *Hodgson v. Fox*, 9 Ch. D. 673; *In re Orpen*; *Beswick v. Orpen*, 16 Ch. D. 202.

Debt due from husband of legatee.

A debt due from the husband of a legatee may of course be retained out of so much of the legacy as is payable to the husband after the legatee's equity to a settlement is satisfied. *M'Mahon v. Burchell*, 5 H. 325.

Assignment under Malins' Act.

Where a married woman assigns her reversionary interest under Sir R. Malins' Act (20 & 21 Vict. c. 57), there is no right as against the assignee to retain a debt due from the husband. *In re Batchelor*; *Sloper v. Oliver*, 16 Eq. 481.

It would seem that if A. is the executor of B. and C., C. being B.'s residuary legatee, a sum due from D. to B. might be retained out of the share to which D. is entitled in C.'s estate. *Stammers v. Elliott*, 3 Ch. 195.

The right of retainer is gone as soon as the executors have set apart and invested a sum to meet a legacy. *Ballard v. Marsden*, 14 Ch. D. 374.

Claims in autre droit.

Cross demands existing in different rights cannot be set off. Thus a debt due to the executor in his personal capacity cannot be retained out of a legacy. *M'Mahon v. Burchell*, 2 Ph. 127; see *Stammers v. Elliott*, 3 Ch. 195; *Middleton v. Pollock*; *Ex parte Nugee*, 20 Eq. 29.

#### IV. EXONERATION OF SPECIFIC LEGACIES.

Exoneration of specific legacies from debts and lia-

##### 1. Liabilities created by testator.

A specific legatee has a right to have his specific legacy freed from the debts and liabilities of the testator existing at his decease. *Stewart v. Denton*, 4 Doug. 219; S. C.

2 Chit. 456; *Barry v. Harding*, 1 J. & Lat. 489; *Fitzwilliams v. Kelly*, 10 Ha. 266. liabilities of  
testator.

So if the testator has pledged the legacy, whether for his own debt or not, the legatee is entitled to compensation. *Knight v. Davis*, 3 M. & K. 358; *Bothamley v. Sherson*, 20 Eq. 304.

## 2. Liabilities incident to the thing.

With regard to payments on specific legacies which become due after the testator's decease, the distinction is between charges created by the testator and charges incident to the chattel.

Thus rent or fines falling due after the testator's death are payable by the legatee. *Fitzwilliams v. Kelly*, 10 Ha. 266; see *Hawkins v. Hawkins*, 13 Ch. D. 470. Rent fall-  
ing due  
after the  
testator's  
death.

As to calls upon shares, the cases are somewhat conflicting; but on the whole it seems if the testator's estate does not remain liable, the liability must be borne by the specific legatee. *Armstrong v. Burnet*, 20 B. 424. Calls on  
shares  
must be  
paid by  
legatee.

And even if the testator's estate remains liable, but the liability is such that neither the testator nor his estate might ever have become chargeable with it, such as the liability on shares in a banking or insurance company, the specific legatee must bear it. *Armstrong v. Burnet*, *suprà*. *Adams v. Ferrick*, 26 B. 384; see *Wright v. Warren*, 4 De G. & S. 367; *Fitzwilliams v. Kelly*, 10 H. 266; *In re Box*, 12 W. R. 67; 1 H. & M. 552.

And it seems that calls on railway shares made after the testator's decease must be borne by the specific legatee. *Day v. Day*, 1 Dr. & Sm. 261.

It would seem that *Blount v. Hopkins*, 7 Sim. 43; *Jacques v. Chambers*, 4 Rail. Cases, 499; and *Clive v. Clive*, Kay, 600, would not now be followed, unless the two former can be supported on the ground that the testator had covenanted to pay the calls within a given time.

A direction to pay calls due upon shares for the time

being constituting part of the testator's residuary estate has been confined to calls upon shares accepted by the testator at the time of his death. *Bevan v. Waterhouse*, 3 Ch. D. 752.

Where a testator, being joint tenant at law with his partner of leasehold property employed for partnership purposes, bequeathed to the partner all his share of the leasehold premises, it was held that the partner was entitled to the moiety only after the partnership debts had been paid. *Farquhar v. Hadden*, 7 Ch. 1.

#### V. EXONERATION OF MORTGAGED PROPERTY.

Exoneration of mortgaged property in cases before Locke King's Act.

In cases not affected by Locke King's Act, 17 & 18 Vict. c. 113, amended by 30 & 31 Vict. c. 69, and 40 & 41 Vict. c. 34, the devisee of mortgaged lands, the mortgages upon which have been either created or adopted by the testator, is entitled, in the absence of a contrary intention, to have the mortgage paid off out of the first four classes of property in the administration of assets; and as regards the fourth, viz., real estate charged with debts generally, if the mortgaged lands are themselves included in the general charge of debts, they must bear a proportionate part of the mortgage. *Middleton v. Middleton*, 15 B. 450; *Harper v. Munday*, 7 D. M. & G. 369.

Pecuniary legacies are not applicable to exonerate mortgaged property, whether freehold or leasehold. *Lutkins v. Leigh*, Cas. t. Talb. 53; *Johnson v. Child*, 4 Ha. 87.

Similarly, where mortgaged lands descend, the heir is entitled to exoneration out of the first two classes of property. *Hill v. Bp. of London*, 1 Atk. 621; *Chester v. Powell*, 7 Jur. 389; *Young v. Furze*, 20 B. 380.

Devise of mortgaged lands subject to the mortgage will not exonerate the personality.

A devise of lands expressly subject to the mortgage thereon will not exonerate the personality, the words "subject to the mortgage" being held merely descriptive. *Duke of Ancaster v. Meyer*, 1 Bro. C. C. 454; *Bickham v. Crutwell*, 3 M. & Cr. 763.



Nor will a direction that part of the mortgaged land is to bear a larger proportion of the mortgage than other part. *Goodwin v. Lee*, 1 K. & J. 377.

But it would seem that a charge of the mortgage debt upon the mortgaged land in a distinct sentence will make the land primarily liable. *Evans v. Cockeram*, 1 Col. 428. See *Hancox v. Abbey*, 11 Ves. 179.

Charge of mortgages on the mortgaged land in a distinct sentence.

The law on this subject has been altered by Locke King's Act, 17 & 18 Vict. c. 113, which enacts that "when any person shall, after the 31st of December, 1854, die seised of or entitled to any estate or interest in any land or other hereditaments, which shall at the time of his death be charged with the payment of any sum or sums of money by way of mortgage, and such person shall not by his will or deed or other document, have signified any contrary or other intention, the heir or devisee to whom such land or hereditaments shall descend or be devised shall not be entitled to have the mortgage debt discharged or satisfied out of the personal estate or any other real estate of such person, but the land or hereditaments so charged shall, as between the different persons claiming through or under the deceased person, be primarily liable to the payment of all mortgage debts with which the same shall be charged, every part thereof, according to its value, bearing a proportionate part of the mortgage debts charged on the whole thereof: Provided always, that nothing herein contained shall affect or diminish any right of the mortgagee on such lands or hereditaments to obtain full payment or satisfaction of his mortgage debt, either out of the personal estate of the person so dying as aforesaid or otherwise. Provided also, that nothing herein contained shall affect the rights of any person claiming under or by virtue of any will, deed or document already made, or to be made before the 1st of January, 1855."

Locke King's Act.

The Act 30 & 31 Vict. c. 69, extends and defines the meaning of the words "contrary or other intention" in the case of testators dying after the 31st December, 1867, and by section 2 declares that in the construction of the principal Act the word mortgage shall be deemed to extend to any lien for unpaid purchase money upon any lands or hereditaments purchased by a testator.

By the Act 40 & 41 Vict. c. 34, it is enacted as follows :

1. The Acts mentioned in the schedule hereto (17 & 18 Vict. c. 113, and 30 & 31 Vict. c. 69) shall, as to any testator or intestate dying after the 31st December, 1877, be held to extend to a testator or intestate dying seised or possessed of or entitled to any land or other hereditaments of whatever tenure, which shall at the time of his death be charged with the payment of any sum or sums of money by way of mortgage, or any other equitable charge, including any lien for unpaid purchase money ; and the devisee or legatee or heir shall not be entitled to have such sum or sums discharged or satisfied out of any other estate of the testator or intestate, unless (in the case of a testator) he shall, within the meaning of the said Acts, have signified a contrary intention ; and such contrary intention shall not be deemed to be signified by a charge of or direction for payment of debts upon or out of residuary real and personal estate, or residuary real estate.

2. This Act shall not extend to Scotland.

#### WHAT PERSONS ARE WITHIN THE ORIGINAL ACT.

What persons are within the Act.

The Crown taking personalty in default of next of kin is within the words "persons claiming through or under the deceased person" in Locke King's Act. *Dacre v Patrickson*, 1 Dr. & Sm. 186.

The heir taking by descent, owing to lapse or otherwise, from a person dying after the 31st December, 1854, is not entitled to exoneration under the exception in the proviso

in the original Act, though the will may be made before the 1st January, 1855. *Power v. Power*, 8 Ir. Ch. 340; *Piper v. Piper*, 1 J. & H. 91; *Nelson v. Page*, 7 Eq. 25.

On the other hand, a devisee taking under a will made before the 1st January, 1855, is within the proviso, though the will may have been republished after that date. *Rolfe v. Perry*, 3 D. J. & S. 481.

#### WHAT PROPERTY IS WITHIN THE ORIGINAL ACT.

Copyholds are within Locke King's Act. *Piper v. Piper*, Copyholds. 1 J. & H. 91.

Land devised on trust for sale and coming to the testator as personalty, is not within that Act. *Lewis v. Lewis*, 13 Eq. 219. Land on trust for sale.

Leaseholds are not within the original Act or the Act of 1867. *Soloman v. Soloman*, 12 W. R. 540; 33 L. J. Ch. 473. *Gael or Gall v. Fenwick*, 22 W. R. 211; 43 L. J. Ch. 178. *In re Wormsley's Estate*; *Hill v. Wormsley*, 4 Ch. D. 665. Leaseholds.

The Act applies where real and personal estate are directed to be converted and the proceeds made a mixed fund. *Elliott v. Dearsley*, 16 Ch. D. 322.

If the mortgage includes freeholds and leaseholds, the mortgage must be apportioned between the freeholds and leaseholds according to their values at the testator's death, and the amount apportioned in respect of the leaseholds will be discharged out of the personal estate or out of the fund appointed for payment of debts. *Gall v. Fenwick*, *supra*.

Curiously enough leaseholds are not specifically named in the Act of 1877, but as that Act extends to "land or other hereditaments of whatever tenure," a term wide enough to include leaseholds, and the devisee or legatee or heir is not to be entitled to exoneration, it would seem that the Act extends to leaseholds.

## WHAT MORTGAGES ARE WITHIN THE ORIGINAL ACT.

Mortgage  
by deposit.

Mortgages by deposit of title deeds, with or without a memorandum of agreement to execute a legal mortgage, are within the Act. *Pembroke v. Friend*, 1 J. & H. 132 ; *Davis v. Davis*, 24 W. R. 962.

So is a deposit of deeds, with a memorandum, though expressed to be only a collateral security. *Coleby v. Coleby*, L. R. 2 Eq. 803.

But a mere general charge by a testator on real estate in aid of his personalty is not within the Act. *Hepworth v. Hill*, 30 B. 476 ; see the Act of 1877, *supra*.

Nor is a covenant to pay off a mortgage on land not belonging to the covenantor. *Day v. Day*, 14 W. R. 261.

Lien for  
purchase-  
money.

A lien for unpaid purchase money upon lands purchased by a testator is, by 30 & 31 Vict. c. 69, s. 2, declared to be within the original Act.

The lien for unpaid purchase money must be borne by the land, though the testator devises only the legal estate without disposing of the beneficial interest. *Dowdall v. McCartan*, 5 L. R. Ir. 313, 642.

The heir of an intestate dying before the 31st December, 1877, is entitled to have a lien for unpaid purchase money upon lands of the intestate discharged out of the personal estate, the case not being provided for by the Act of 1867. *Harding v. Harding*, 13 Eq. 493.

The heir of an intestate dying after the 31st December, 1877, is not entitled to have a lien for unpaid purchase money discharged. See the Act of 1877, *supra*, p. 128.

## WHAT IS A CONTRARY INTENTION WITHIN THE ACT.

Direction  
to pay  
debts.

It was decided that a general direction to pay debts, or to pay debts out of the estate, did not show the contrary intention required by Locke King's Act. *Pembroke v.*

*Friend*, 1 J. & H. 132; *Brownson v. Laurance*, 6 Eq. 1; *Woolstencroft v. Woolstencroft*, 2 D. F. & J. 347.

Whether the fact that mortgaged lands are devised in strict settlement would make any difference seems doubtful, at any rate it would not where the testator himself contemplates the mortgages as subsisting from generation to generation. *Coote v. Lowndes*, 10 Eq. 376.

But a direction, that the debts are to be paid out of the personal estate or out of any particular fund, was held to show a contrary intention. *Moore v. Moore*, 1 D. J. & S. 602; *Eno v. Tatham*, 3 D. J. & S. 443; 32 L. J. Ch. 311; *Mellish v. Vallins*, 2 J. & H. 194; *Newman v. Wilson*, 31 B. 33; *Maxwell v. Hyslop*, L. R. 4 Eq. 407; *ib.* 4 H. L. 506. See *Allen v. Allen*, 30 B. 395; *Porcher v. Wilson*, 12 W. R. 1001.

By the 30 & 31 Vict. c. 69, however, it is enacted that in the wills of testators dying after the 31st December, 1867, a declaration that debts are to be paid out of the personal estate is not to be deemed a declaration of intention to exonerate mortgaged lands.

Under this Act, "if a testator wishes to give a direction which shall be deemed a declaration of an intention contrary to the rule laid down by Locke King's Act, it must be a direction applying to his mortgage debts in such terms as distinctly and unmistakably to refer to them;" per Giffard, V.-C., in *Nelson v. Page*, 7 Eq. 25, p. 28. See *Allen v. Allen*, 30 B. 395; *Greated v. Greated*, 26 B. 621.

In cases governed by the Act of 1867, a direction to pay debts out of a mixed fund of realty and personalty, or a direction to pay debts out of the personal estate in exoneration of the real estate, or a charge of debts on certain real estate in aid of the personal estate and in exoneration of the other real estate, will not entitle the devisee of mortgaged lands to have the mortgage discharged. *Gael or Gall v. Fenwick*, 22 W. R. 211; 43 L. J. Ch. 178; *In*

*re Rossiter; Rossiter v. Rossiter*, 13 Ch. D. 355; *In re Newmarch; Newmarch v. Storr*, 9 Ch. D. 12; *Elliott v. Dearsley*, 16 Ch. D. 322; and see the Act of 1877, *supra*, p. 128.

Specific devisee of part of land subject to a mortgage is not entitled to exoneration.

Where part of lands subject to a mortgage is specifically devised and the rest given to the residuary devisee, or where a life interest is given and the remainder is given to the residuary devisee, there is no evidence of an intention, that the mortgage is to be borne by the residuary devisee. *Gibbins v. Eyden*, 7 Eq. 371; *Sackville v. Smith*, 17 Eq. 153, overruling *Brownson v. Lawrance*, 6 Eq. 1.

Direction to pay mortgages out of insufficient fund.

The further question may arise whether, supposing the testator directs the mortgages to be paid out of a specific fund, the devisees will be entitled to exoneration if that fund is insufficient.

It would seem, where the fund is a fund of personality, the devisees will not be entitled to exoneration beyond the value of the fund. *Rodhouse v. Mold*, 13 W. R. 854; 35 L. J. Ch. 67.

On the other hand, it is laid down by Lord Romilly in *Allen v. Allen*, 30 B. 403, that where a mortgage on Whiteacre is directed to be paid out of Blackacre the mortgagee is entitled to exoneration out of the personal estate in the first place, as the Act only directs that the mortgaged land shall be primarily liable, and does not alter the ordinary rules of administration, where there is an intention that it should not be so liable. But *quære* whether the decision above cited and this dictum are reconcilable; and see *Smith v. Moreton*, 37 L. J. Ch. 6.

How far mortgaged lands applicable in payment of mortgages.

It would seem, that where mortgages are directed to be paid and the personality is insufficient to pay them, the several lands bear only the mortgages secured upon them, and not a proportionate share of all the mortgages. *Wisden v. Wisden*, 5 Jur. N. S. 455.

Mortgaged estate

Where different portions of an estate subject to a mort-

gage are devised to different persons, the devisees must contribute rateably to pay the mortgage according to the value of the portions devised to them. *In re Newmarch; Newmarch v. Storr*, 9 Ch. D. 12.

The same rule applies if the mortgage comprises real and personal property. The devisees of the land and the legatees of the personality contribute rateably. *Trestrail v. Mason*, 7 Ch. D. 655.

Where several properties are mortgaged contemporaneously by different deeds, the fact that one of the mortgages is called a collateral security will not throw the mortgage debt primarily on the property comprised in the other mortgage. *Early v. Early*, 16 Ch. D. 214; *In re Athill*, 16 Ch. D. 211.

Where a testator mortgages certain land and then mortgages other land for the same debt and further advances, the whole amount due will, as between the devisees of the different lands, be treated as one debt, and must be borne rateably by the various properties unless it is shown that the land first charged was intended to be the primary security for the amount advanced prior to the second mortgage. *Leonino v. Leonino*, 10 Ch. D. 460, where the cases of *Lipscomb v. Lipscomb*, 7 Eq. 501, and *De Rochefort v. Dawes*, 12 Eq. 540, are discussed; and see *Stringer v. Harper*, 26 B. 33; *Evans v. Wyatt*, 31 B. 217.

Where a portion of lands subject to a charge is conveyed by a voluntary deed, containing only a covenant for further assurance, and the rest is devised, the lands conveyed and devised must bear the charge rateably. *Ker v. Ker*, 1 R. 4 Eq. 15.

## VI. RENTS, PROFITS, AND INCOME.

1. A present devise of lands being specific carries the rents and profits from the death of the testator.

Devisee is entitled to rents from

the testator's death.

But a devise of all the testator's interest in an estate when recovered will not carry rents accrued due prior to his death. *Scott v. Best*, 6 L. R. Ir. 7.

Where the devise is of rents due prior to the testator's death, derived from property of which the testator is tenant for life, interest upon charges must be deducted, unless the charges are vested in the testator. *Lindsay v. Earl of Wicklow*, I. R. 6 Eq. 72.

Specific bequest.

2. A specific bequest, if vested, carries all the income and profits which may accrue upon it after the testator's death. *Clive v. Clive*, Kay, 600; *Maclaren v. Stainton*, 3 D. F. & J. 202; and see *Carron Company v. Hunter*, L. R. 1 H. L. Sc. 362.

What are profits.

The question sometimes arises what are profits accruing after the death of the testator.

Bonus on shares.

A bonus or dividend on shares declared before the testator's death, but not payable till afterwards, will not pass with the shares. *Lock v. Venables*, 27 B. 598; *De Gendre v. Kent*, L. R. 4 Eq. 283.

Partnership profits.

Nor will the profits of a partnership, declared after the testator's death, for a period ending in his lifetime. *Ibbotson v. Elam*, L. R. 1 Eq. 188; *Browne v. Collins*, 12 Eq. 586.

Debts.

On the other hand, a debt is to be considered as the profits of the year in which it is paid. *Maclaren v. Stainton*, 3 D. F. & J. 202.

Apportionment Act.

3. Since the Apportionment Act, 33 & 34 Vict. c. 35, rents, annuities, dividends and other periodical payments in the nature of income are to be considered as accruing from day to day, and are apportionable where the testator dies between two rent days.

The 5th section defines dividends as including all payments made by the name of dividend, bonus, or otherwise out of the revenue of trading or other public companies, whether such payments shall be usually made or declared



at any fixed times or otherwise ; but they do not include payments in the nature of a return or reimbursement of capital.

The Act has been held to apply to a will executed before <sup>will</sup> and confirmed by a codicil executed after the passing of <sup>before Act.</sup> the Act. *Hasluck v. Pedley*, 19 Eq. 271 ; *Constable v. Constable*, 48 L. J. Ch. 621 ; see *Roseingrave v. Burke*, I. R. 7 Eq. 187.

It has even been held to apply to the will of a testator dying before the Act came into operation. *In re Clive's Estate*, 18 Eq. 213 ; *Patching v. Barnett*, 28 W. R. 886 ; see *Jones v. Ogle*, 8 Ch. 192.

The Act applies to specific as well as to residuary devises. *Capron v. Capron*, 17 Eq. 288 ; *Pollock v. Pollock*, 18 Eq. 329, overruling *Whitehead v. Whitehead*, 16 Eq. 528 ; see *A.-G. v. Daly*, I. R. 8 Eq. 595.

The profits of a private trading partnership, or of a <sup>Profits of private partner-</sup> business belonging to the testator, are not apportionable <sup>ship.</sup> under the Act. *Jones v. Ogle*, 8 Ch. 192 ; *In re Cox's Trusts*, 9 Ch. D. 159.

A public company within the meaning of the Act need <sup>What is a public company.</sup> not necessarily be an incorporated company. See *In re Griffith* ; *Carr v. Griffith*, 12 Ch. D. 655.

A bonus or surplus profits distributed among the shareholders of a public company once in five years is apportionable under the Act. *In re Griffith, supra*.

In determining what is corpus and what interest the Apportionment Acts apply as well between tenant for life and remainderman as where in certain events an absolute interest is cut down to a life interest. *Clive v. Clive*, 7 Ch. 433.

4. A future devise of lands, whether the fee is vested <sup>Future devise does not carry the intermediate rents.</sup> in trustees or is in abeyance, does not carry the intermediate rents and profits, which pass either under the residuary clause, if there is one, or to the heir. *Hopkins*

v. *Hopkins*, Ca. t. Talb. 45; *Duffield v. Duffield*, 3 Bl. N. S. 260; *Percival v. Percival*, 9 Eq. 386; *In re Eddel's Trust*, 11 Eq. 559; see, however, *Best v. Donmall*, 40 L. J. Ch. 160.

The intermediate rents are undisposed of till the actual birth of the devisee. *Richards v. Richards*, Jo. 754; *Mowlem's Trust*, 18 Eq. 9; see *Rawlins v. Rawlins*, 2 Cox, 425; *Goodale v. Gawthorne*, 2 W. R. 680; 2 Sm. & G. 375.

Contingent specific bequest.

5. A contingent specific bequest of chattels real or personalty will not carry the intermediate profits except perhaps in the case of a person who would be entitled to interest on a general legacy from the testator's death. See *post*, p. 138, *et seq.*; *Holmes v. Prescott*, 12 W. R. 636; see *Wright v. Warren*, 4 De G. & S. 367.

Future residuary devise.

6. A future residuary devise, or a devise subject to prior limitations which may or may not take effect, will not carry intermediate rents and profits. *Hodgson v. Earl of Bective*, 1 H. & M. 376; 12 W. R. 625; 10 H. L. 656; *Wade Gery v. Handley*, 1 Ch. D. 653; 3 Ch. D. 374; overruling *Sidney v. Wilmer*, 4 D. J. & S. 84.

A future residuary bequest carries the intermediate interest.

7. A contingent residuary gift of personalty carries the intermediate interest during the period allowed for accumulation. *Green v. Ekins*, 2 Atk. 473; *Drakeley's Estate*, 19 B. 395; *Earl of Bective v. Hodgson*, 12 W. R. 625; 10 H. L. 656.

The case of *Green v. Tribe*, 27 W. R. 39, appears to be inconsistent with *Earl of Bective v. Hodgson*, unless it can be supported on the ground that the income of residuary personalty bequeathed to a class is undisposed of until a member of the class comes into being.

Chattels real comprised in a residuary gift follow the same rule as personalty proper. *Hodgson v. Earl of Bective*, 1 H. & M. 376; 10 H. L. 656.

So will a future

8. If realty and personalty are blended in a future

residuary gift, intermediate profits will pass. *Genery v. Fitzgerald*, Jac. 468; *Glanvill v. Glanvill*, 2 Mer. 38; *Ackers v. Phipps*, 9 Bl. N. S. 431; 3 Cl. & F. 665. residuary gift of a mixed fund.

9. Personalty to be laid out in land, or realty to be converted, follow the rules of personalty and realty respectively. *Bective v. Hodgson*, 10 H. L. 656.

When there is a gift to a class, which is capable of increase up to the time of distribution, the whole of the income for the time being goes to those members who take vested interests from time to time. *Shepherd v. Ingram*, Amb. 448; *Mills v. Norris*, 5 Ves. 335; *Scott v. Earl of Scarborough*, 1 B. 154; *Mainwaring v. Beevor*, 8 Ha. 44; *Furneaux v. Rucker*, W. N. 1879, 135. When there is a gift to a class the income goes to those who take vested interests from time to time.

## VII. INTEREST ON GENERAL LEGACIES.

Where a legacy is contingent or payable at a future time, and interest is given in the meantime or the income is given for maintenance, the whole interest or income as it accrues vests absolutely in the legatee. *Harris v. Finch*, M'Clel. 141; *In re Peek's Trust*, 16 Eq. 221. Interest given to a legatee vests absolutely as it accrues.

Where a legacy is charged upon land only, interest is payable from the testator's death. *Spurway v. Glyn*, 9 Ves. 483; *Shirt v. Westby*, 16 Ves. 393; *Pearson v. Pearson*, 1 Sch. & Lef. 10. Legacy charged on land only, carries interest from the death.

On the other hand, a legacy charged upon the proceeds of the sale of lands follows the ordinary rules applicable to general legacies with regard to interest. *Turner v. Buck*, 18 Eq. 301. Not if charged on proceeds of sale of lands.

General legacies, including gifts by appointment under a power vested in a married woman, are payable at the end of a year from the testator's death. *Tatham v. Drummond*, 2 H. & M. 262.

A. Therefore, where no time for payment is fixed, interest runs from the end of a year from the testator's death, whether the legacies are payable "as soon as possible," or From what time interest is payable on general

legacies  
when no  
time for  
payment is  
appointed.

not. *Webster v. Hale*, 8 Ves. 410; *Benson v. Maude*, 6 Mad. 15.

The amount allowed is 4 per cent., and it appears to be now settled that that amount only will be allowed, though the personalty may be in a country where the current rate of interest is higher. Cons. Orders XLII., r. 11; *Bourke v. Ricketts*, 10 Ves. 330; *Hamilton v. Dallas*, 38 L. T. N. S. 215.

A direction that no legacy shall be payable until six months after the testator's death will not alter the general rule. *Jauncey v. A.-G.*, 10 W. R. 129; 3 Giff. 308.

Direction  
to pay out  
of fund  
when  
received.

Where there is a clear gift of a legacy, a direction to pay it out of a particular fund when received will not alter the rule that the legatee is entitled to interest from the end of a year after the testator's death. *Wood v. Penoyre*, 13 Ves. 326; see *Kirkpatrick v. Bedford*, 4 App. C. 96.

But if the trust to pay legacies only arises after the fund is got in, interest is not payable till then. *Lord v. Lord*, 2 Ch. 782.

A direction to apply a sum for building a church when it is wanted, without interest in the meantime, will not deprive the legacy of interest if payment is delayed by litigation. *Fisher v. Brierley*, 30 B. 268.

Effect of  
charge on  
a rever-  
sionary  
interest.

The rule as to interest is not altered by the fact that the legacies are charged upon personalty and a reversionary interest in realty, and if the personalty is insufficient, the legacies nevertheless bear interest from a year after the death. *Freeman v. Simpson*, 6 Sim. 75; *Earl of Milltown v. French*, 4 Cl. & F. 276; 10 Bl. N. S. 1.

But this is not the case where the fund out of which the legacy is primarily payable is wholly reversionary. *Earl v. Bellingham*, 24 B. 448.

Interest  
payable  
from the  
death.  
Testator in

On the other hand, interest is payable from the testator's death :—

1. Where the testator is the father or in *loco parentis*

to the legatee, provided the latter is an infant. *Wilson v. Maddison*, 2 Y. & C. C. 372. *Wilson v. loco parentis to an infant.*

If the infant is *in ventre* at the testator's death, interest runs only from his birth. *Rawlins v. Rawlins*, 2 Cox, 425.

2. Where the legatee, though a stranger, is an infant, and maintenance is given out of the legacy. *Newman v. Bateson*, 3 Sw. 689. Maintenance directed out of the legacy.

3. Where the legacy is in satisfaction of a debt of the testator. *Clarke v. Sewell*, 3 Atk. 99. Legacy in satisfaction of a debt.

A legacy in satisfaction of the debts of another person will not *prima facie* carry interest till the expiration of a year from the testator's death. *Askew v. Thompson*, 4 K. & J. 620.

But if certain property is to be applied among such persons as have "any just or indisputable demand" upon a third person, interest will be payable on the debts as far as the fund will go. *Aston v. Gregory*, 6 Ves. 151.

B. A legacy payable at a future day, whether vested or not, carries interest only from the time fixed for its payment. *Lloyd v. Williams*, 2 Atk. 108; *Heath v. Perry*, 3 Atk. 101; *Festing v. Allen*, 5 Ha. 575; *Gotch v. Foster*, 5 Eq. 311; *Lord v. Lord*, L. R. 2 Ch. 782; *Holmes v. Crispe*, 18 L. J. Ch. 439. When a time of payment is fixed interest runs from then.

If the period arrives in the testator's lifetime interest runs from his death. *Coventry v. Higgins*, 14 Sim. 30; *Pickwick v. Gibbes*, 1 B. 271.

The personal representatives of a legatee entitled to a vested legacy stand in no better position than the legatee; therefore, where a time for payment is fixed and the legatee would not have been entitled to interest in the meantime, the legacy is not payable to the personal representatives till the time when it would have been payable to the legatee. *Chester v. Painter*, 2 P. Wms. 336; *Roden v. Smith*, Amb. 588; *Maher v. Maher*, 1 L. R. Ir. 22.

Excep-  
tions.

But though a period is appointed for payment, or the legacy is contingent, interest runs from the death:—

Testator

in *loco*  
*parentis* to  
an infant.

1. Where the legatee is an infant child of the testator, or an infant to whom the testator has placed himself in *loco parentis*, and the will provides no other maintenance, whether the legacy be vested or contingent. *Harvey v. Harvey*, 2 P. W. 21; *Incedon v. Northcote*, 3 Atk. 432, 438; *Donovan v. Needham*, 9 B. 164; *May v. Potter*, 25 W. R. 507; see *Mole v. Mole*, 1 Dick. 310.

Provision  
for main-  
tenance.

If the testator has made a provision for the maintenance of his infant children, interest only runs from the time when the legacy is payable. *Hearle v. Greenbank*, 3 Atk. 697, 716; *Wynch v. Wynch*, 1 Cox, 433; see *In re George*, 5 Ch. D. 837.

Where there is provision for maintenance during a portion of the minority of the legatee, interest on the legacy will be allowed during the rest. *Chambers v. Goldwin*, 11 Ves. 1; *Martin v. Martin*, L. R. 1 Eq. 369; see *Cusack v. Jellicoe*, 22 W. R. 344.

2. If the infant legatee is a stranger, but the income is given for maintenance, interest runs from the death. *In re Richards*, 8 Eq. 119; *Chidgey v. Whitby*, 41 L. J. Ch. 699.

General in-  
tention to  
provide  
mainten-  
ance.

3. Upon similar grounds, where the legatees are strangers, if a general intention is expressed of providing for their maintenance out of their legacies, interest runs from the death. *Pett v. Fellows*, 1 Sw. 561, *note*; *Lambert v. Parker*, Coop. t. Eldon, 143; *Leslie v. Leslie*, Ll. & G. t. Sug. 1.

The fact that maintenance is given in one particular event which does not happen is not enough. *Feeting v. Allen*, 5 Ha. 575.

Lord Cran-  
worth's  
Act.

Under Lord Cranworth's Act, 23 & 24 Vict. c. 145, sec. 26, which applies to wills executed or confirmed after the 28th August, 1860, the whole or any part of the income of

any legacy, to the income and capital of which an infant is contingently entitled, may be paid towards his maintenance in all cases.

That Act enables the income of a legacy to be applied for maintenance, though the gift both of income and capital is contingent, provided the legatee will be entitled to income and capital if the legacy becomes vested. *In re Cotton*, 1 Ch. D. 232; see *In re Breed's Will*, 1 Ch. D. 226.

It does not apply to a case where the legatee would not be entitled to the intermediate income in the event of the legacy becoming vested. *In re George*, 5 Ch. D. 837.

4. Where a fund is directed to be at once set apart from the rest of the testator's estate, it carries the income from the testator's death. *Boddy v. Dawes*, 1 Kee. 362; *Dundas v. Wolfe Murray*, 1 H. & M. 425; *Johnson v. O'Neill*, 3 L. R. Ir. 476. Severed fund.

A fund which has been severed for the benefit of a tenant for life and remainderman carries the interest accruing between the death of the tenant for life and the vesting in the remainderman. *Kidman v. Kidman*, 40 L. J. Ch. 359.

To entitle the legatees of a severed fund to interest before vesting the severance must be necessary from causes connected with the legacy itself, and not, for instance, because the residue has become immediately payable. *Festing v. Allen*, 5 Ha. 578.

Where there is a future gift of principal "with interest," interest is calculated from the end of a year after the testator's death till the time of payment. *Knight v. Knight*, 2 S. & St. 490. Future gift of principal with interest.

Where a vested legacy is given to an infant and no time of payment is fixed and the legacy is given over upon a contingency, the infant or his representatives are entitled to the interest which has accrued due till the contingency Vested legacy divested.

happens. *Taylor v. Johnson*, 2 P. W. 504; *Barber v. Barber*, 3 M. & Cr. 688; *Mills v. Roberts*, 1 R. & M. 555.

The person taking a vested interest under the gift over, no condition as to payment being annexed to his gift, is entitled to interest from the time when the gift over takes effect, or from a year after the testator's death, whichever period is latest. *Laundy v. Williams*, 2 P. W. 481.

### VIII. PAYMENT OF ANNUITIES.

**From what time annuities are payable.** An annuity begins to run from the death of the testator; the first payment is therefore due at the end of a year unless the annuity is directed to be paid monthly or quarterly, in which case instalments are payable at the end of the first month or quarter. *Houghton v. Franklin*, 1 S. & St. 390.

If payment on stated quarterly days is directed a proportional part is payable on the first quarterly day. *Williams v. Wilson*, 5 N. R. 266.

If the first payment of an annuity payable quarterly is directed to be made at the end of eighteen months, a quarter's instalment is payable at that time. *Irvin v. Ironmonger*, 2 R. & M. 531.

As to the postponement of an annuity till debts and legacies are paid, see *Astley v. Earl of Essex*, 6 Ch. 898; *Rawson v. McCausland*, 1 R. 7 Eq. 284; 22 W. R. 145.

**Particular legacy for life with remainder.** It does not appear to be quite settled when interest is payable on a gift of a particular legacy, not residuary, to one for life with remainder over; see *Gibson v. Bott*, 7 Ves. 89, where Lord Eldon lays down that interest is not payable till the end of the second year.

**Arrears of an annuity do not carry interest.** Arrears of an annuity will not as a rule carry interest. *Batten v. Earnley*, 2 P. Wms. 163; *Anderson v. Dwyer*, 1 Sch. & Lef. 301; *Martin v. Blake*, 3 Dr. & War. 125; *Taylor v. Taylor*, 8 Ha. 120; *Torre v. Browne*, 5 H. L. 555; *Wheateley v. Davies*, 24 W. R. 818.



## IX. LEGACY DUTY AND INCOME TAX.

Legacy duty, in the absence of a direction to the contrary, <sup>Legacy duty—</sup> is in all cases payable by the legatee even though the legacy <sup>what</sup> is to a creditor in discharge of a debt due from a third <sup>amounts to</sup> person. *Foster v. Ley*, 2 Sc. 438; 2 B. N. C. 269. <sup>a gift free from duty.</sup>

Legacies given free from deduction or free from expense, <sup>Free from</sup> or free from charge or liability, are free from duty. *Barksdale v. Gilliatt*, 1 Sw. 652; *Courtoy v. Vincent*, T. & R. 433; *Gosden v. Dotterill*, 1 M. & K. 56; *Louch v. Peters*, 1 M. & K. 489; *Warbrick v. Varley*, 30 B. 241; see *Stow v. Davenport*, 5 B. & Ad. 357; 2 Nev. & M. 835; and see *Turner v. Mullineux*, 1 J. & H. 334. <sup>deductions.</sup>

A gift of a clear sum or annuity is a gift clear of legacy <sup>Gift of a</sup> duty. *Gude v. Mumford*, 2 Y. & C. Ex. 448; *Haynes v.* <sup>"clear"</sup> *Haynes*, 3 D. M. & G. 590. <sup>sum.</sup>

So is a gift of a fund to produce a clear annual sum, which sum is to be paid to the legatee. *Morris v. Burton*, 11 Sim. 161; *Cole's Will*, 8 Eq. 271.

But a gift of a fund to produce a clear annual sum and to pay the dividends of the stock, and not the exact sum to the legatee, is not a gift free from legacy duty, the term clear being referred to the costs of investment. *Banks v. Braithwaite*, 32 L. J. Ch. 35; *Sanders v. Kiddell*, 7 Sim. 536; *Pridie v. Field*, 19 B. 497.

A direction to pay an annuity free from deduction will not release the legatee from paying income tax. *Abadam v. Abadam*, 12 W. R. 615; 33 B. 475; *Turner v. Mullineux*, 1 J. & H. 334.

But the testator may by proper words direct the income tax upon an annuity to be paid out of his estate. *Festing v. Taylor*, 11 W. R. 70; 3 B. & S. 217, 235; *Lord Lovat v. Duchess of Leeds*, 10 W. R. 397.

## CHAPTER XVIII.

## AS TO THE MEANING OF CERTAIN WORDS.

Money—  
what it  
includes.

I. MONEY includes bank notes (*a*), money at the bank on a current account as well as on deposit (*b*), money in the hands of an agent of the testator (*c*), apparently arrears of a superannuation allowance from government and money payable by a friendly society for funeral expenses (*d*), and any money, of which at the time of the testator's death, he might have claimed immediate payment (*e*). *Chapman v. Hart*, 1 Ves. Sen. 271 (*a*); *Manning v. Purcell*, 7 D. M. & G. 55 (*b*); *Ogle v. Knipe*, 8 Eq. 434 (*c*); *Collins v. Collins*, 12 Eq. 455 (*d*); *Byrom v. Brandreth*, 16 Eq. 476 (*e*).

What it  
does not  
include.

It will not pass an apportioned part of an annuity nor accruing interest (*a*), nor money deposited with a stakeholder to abide the event of a bet (*b*), nor money due on a current account from a salesmaster (*c*), nor a legacy not acknowledged to be at the testator's disposal (*d*), nor stock in the funds (*e*). *Byrom v. Brandreth*, 16 Eq. 475 (*a*); *Manning v. Purcell*, 7 D. M. & G. 55 (*b*); *Smith v. Butler*, 3 J. & L. 565; *De Roebuck v. Lord Cloncurry*, 1 R. 5 Eq. 588 (*c*); *Byrom v. Brandreth*, 16 Eq. 475 (*d*); *Hotham v. Sutton*, 15 Ves. 319; *Gosden v. Dotterill*, 1 M. & K. 56; *Ommaney v. Butcher*, T. & R. 260; *Lowe v. Thomas*, Kay, 369; 5 D. M. & G. 315; *Collins v. Collins*, 12 Eq. 455 (*e*).

Money will, however, pass stock where there is at the date of the will and the death no money properly so called ;

or where stock is expressly referred to as money. *Chapman v. Reynolds*, 28 B. 221; *Newman v. Newman*, 26 B. 218.

In some cases a larger sense has been given to the term money, and it has been held to pass the residuary personalty : When the word money will pass the residue.

1. It is clear that a gift of "the whole of my money" will only pass money properly so called, though there may be very little of it, and it is given for life with remainders, at any rate where the gift is followed by specific or general bequests. *Lowe v. Thomas*, Kay, 369; 5 D. M. & G. 315; *Larner v. Larner*, 3 Dr. 704.

So, too, money must be construed strictly where it is used as one of several terms of description, showing that it was not alone meant to pass the personal estate. *Cowling v. Cowling*, 26 B. 449.

2. But where the testator declared himself desirous of making a settlement of his affairs and appointed executors to take and receive all moneys in his possession or due to him, the whole personal estate was held to pass. *Waite v. Combes*, 5 De G. & S. 676.

And in *Prichard v. Prichard*, 11 Eq. 232, the whole personal estate was held to pass under a gift of the "income of my principal money" to A. for life, and afterwards to be divided among her children, apparently on the ground that there was only a sum of 239*l.* money proper at the testator's death. See *Cooke v. Wagster*, 2 Sm. & G. 296.

3. When there is a direction to pay debts, or legacies have been given, and the residue of money is then given, the whole personal estate will pass. The general personalty being liable to pay debts and legacies, the residue must be a residue *ejusdem generis*. *Lynn v. Kerridge*, West. Rep. tem. Hard. 172; *Legge v. Asgill*, T. & R. 265, *n.*; *Rogers v. Thomas*, 2 Kee. 8; *Dowson v. Gaskoin*, *ib.* 14; *Stocks v. Barré*, Jo. 54; *Barrett v. White*, 24 L. J. Ch. 724; 1

Gift of residue of money after payment of debts and legacies.

Jur. N. S. 652; *Grosvenor v. Durston*, 25 B. 99. See, too, *Langdale v. Whitfield*, 4 K. & J. 426. *Gosden v. Dotterill*, 1 M. & K. 56, must be considered overruled.

In such a case the fact that a specific legacy is afterwards given makes no difference. *Montagu v. Earl of Sandwich*, 33 B. 324.

Similarly, where the testator gave his money and goods to his wife for life and at her death bequeathed certain legacies and the remainder of his property, the money was held to include the personal estate, as the testator showed that he was disposing at his wife's death of the same property as he meant her to have for life. *Glendening v. Glendening*, 9 B. 324.

Of course, if there is an express gift of residue, money must be construed in its strict sense. *Willis v. Plaskett*, 4 B. 208.

And a gift by codicil of "all moneys that may be left after my decease" where there is a gift of residue in the will passes only money properly so called. *Williams v. Williams*, 8 Ch. D. 789.

Ready  
money, &c.

Such words as "ready money" (a), or "money to my account" (b), or "money in bonds or consols or anything else" (c), or money referred to as "cash" (d), would require a very strong context to pass more than would be included in the words if taken in the ordinary sense. *Re Powell, Jo.* 49; *Bevan v. Bevan*, 5 L. R. Ir. 57 (a); *Hastings v. Ilane*, 6 Sim. 67 (b); *Stooke v. Stooke*, 35 B. 396 (c); *Nevinson v. Lady Lennard*, 34 B. 487 (d).

Money  
"of or to  
which I  
may be  
possessed  
or en-  
titled."

Money due  
and owing.

"Money of or to which the testator may be possessed or entitled" will include moneys due on security or otherwise. *Langdale v. Whitfield*, 4 K. & J. 426; see *Wilkes v. Collin*, 8 Eq. 338.

"Money due and owing at the testator's decease" will pass a balance at the bank (a), stock (b), damages recovered by the executor and unliquidated at the time of the

death (c), money receivable on a policy of insurance upon the testator's life (d), and money due to the testator from an executor where the estate has been got in before the testator's death (e). *Carr v. Carr*, 1 Mer. 541 (a); *Waite v. Combes*, 5 De G. & S. 676 (b); *Bide v. Harrison*, 17 Eq. 76 (c); *Petty v. Wilson*, 4 Ch. 574 (d); *Bainbridge v. Bainbridge*, 9 Sim. 16 (e). See *Byrom v. Brandreth*, 16 Eq. 475.

Such words will not pass a distributive share in a residuary personal estate not proved to have been got in at the time of the death; nor money due on a contract of service not completed till after the testator's death. *Martin v. Hobson*, 8 Ch. 401; *Stephenson v. Dowson*, 3 B. 342. See *Collins v. Doyle*, 1 Russ. 135.

"Ready money" will pass money at call at a bank, or Ready money in the hands of an agent used as a banker. *Parker v. Marchant*, 1 Y. & C. Ch. 290; 1 Ph. 356; *Powell's Trust*, Jo. 49; *Vaisey v. Reynolds*, 5 Russ. 12; *Fryer v. Rankin*, 11 Sim. 55.

It will not pass notes of hand (a), nor debts due from an agent (b), or in the hands of a salesmaster (c), nor dividends not demanded (d), nor rent or interest due on a mortgage (e). *Powell's Trust*, Jo. 49 (a); *Parker v. Marchant*, 1 Y. C. C. 290 (b); *Smith v. Butler*, 1 J. & L. 692 (c); *May v. Grove*, 3 De G. & S. 462 (d); *Fryer v. Rankin*, 11 Sim. 55 (e).

Similarly "cash" will not include bonds, long annuities Cash. or promissory notes. *Beales v. Crisford*, 13 Sim. 592.

A gift of "all I hold in the bank" has been held to pass deposit receipts and cash. *Townsend v. Townsend*, 1 L. R. Ir. 180.

As to the meaning of the words "money in the funds," Money in the funds. see *Burnie v. Getting*, 2 Coll. 324; *Mangin v. Mangin*, 16 B. 300; *Ridge v. Newton*, 2 D. & War. 239; *Slingsby v. Grainger*, 7 H. L. 273; *Ellis v. Eden*, 23 B. 543; *Brown v. Brown*, 6 W. R. 613.

A bequest of funds "purchased" out of separate estate will not pass savings of separate estate at the bank. *Askew v. Rooth*, 17 Eq. 426.

Nor will a gift of "property bequeathed to me" pass property intended to be bequeathed to the testator, but in fact given to him by act *inter vivos*. *In re Armstrong*, 49 L. J. Ch. 53.

Securities  
for money.

"Securities for money" will not pass a balance on current account at the bank (a), money on a deposit account (b), I. O. U.'s (c), shares (d), bank stock (e), mere debts (f), a lien for unpaid purchase-money (g), or money lent on mortgage where the legal estate is in trustees, and the testator is entitled only to the residue after certain payments (h), *Vaisey v. Reynolds*, 5 Russ. 12 (a); *Hopkins v. Abbott*, 19 Eq. 222 (b); *Barry v. Harding*, 1 J. & Lat. 475 (c); *Huddleston v. Gouldbury*, 10 B. 547; *Turner v. Turner*, 21 L. J. Ch. 843 (d); *Ogle v. Knipe*, 8 Eq. 434 (e); *Re Mason's Will*, 34 B. 494 (f); *Goold v. Teague*, 7 W. R. 84; 5 Jur. N. S. 116 (g); *Ogle v. Knipe*, *supra* (h).

But it passes money lent on mortgage, the right to receive which is in the testator, and stock in the funds. *Ogle v. Knipe*, *supra*; *Bescoby v. Pack*, 1 S. & St. 500.

Whether  
the legal  
estate in a  
mortgage  
passes.

And under the term securities for money the legal estate in mortgaged property will pass whether there are words of limitation or not. *King's Mortgage*, 5 De G. & S. 644; *Ex parte Barber*, 5 Sim. 451; *Mather v. Thomas*, 6 Sim. 115; 10 Bing. 44; 3 M. & Sc. 687; *Rippen v. Priest*, 13 C. B. N. S. 308.

And this will be the case though the subject matter of the gift is expressly made subject to payment of debts, a direction inapplicable to the legal estate. *Re Field*, 9 Ha. 414; *Knight v. Robinson*, 2 K. & J. 503; overruling *Silvester v. Jarman*, 10 Pr. 78.

It seems the fact that the gift is to several persons as tenants in common, would not prevent the legal estate from

passing. *Ex parte Whiteacre*, cited 1 Sand. on Uses, 359 n.; 1 Jar. 661.

It seems doubtful whether the term "money on security" <sup>Money on security.</sup> will by itself pass the legal estate in mortgaged property; but it will if the donee is to receive money on security, &c. *Re Cautley*, 17 Jur. 124; 22 L. J. Ch. 391; *Doe d. Guest v. Bennett*, 6 Ex. 892; *Arrowsmith's Trust*, 27 L. J. Ch. 704; 4 Jur. N.S. 1123; see *Brown v. Brown*, 6 W. R. 613.

But the term will not pass a charge created under a settlement to which the testator is entitled. *Earl Poulett v. Hood*, 35 B. 234.

Possibly the expression rights and credits might pass the personal estate. *Hutchinson v. Hutchinson*, 13 Ir. Eq. 332.

A gift to A. of the debts due from him to the testator <sup>Debts.</sup> means the debts remaining after deducting a debt due from the testator to A. *Elkins v. Morris*, 8 W. R. 301; *Ganly v. Dowling*, 5 L. R. Ir. 628.

Book debts appear to mean the amount due to the <sup>Book debts.</sup> testator after deducting trade debts and private debts due from him. *Chick v. Bluckmore*, 2 W. R. 488.

A gift to A. of a debt due from him means a debt due from him solely if there is such a debt, and not a debt due from the firm to which A. belongs. *Ex parte Kirk*; *In re Bennett*, 5 Ch. D. 800.

In the same way a bequest of a debt due to the testator from A. would naturally mean a debt due to the testator alone, and not the testator's share of a debt due from A. to the testator's firm, though it may have that meaning if there is no debt due to the testator solely. *Maybery v. Brooking*, 7 D. M. & G. 673.

A direction to pay the testator's debts, including a debt of a certain amount owing to A. where the amount of the debt is overstated, will not entitle A. to receive more than the amount strictly owing. *Wilson v. Morley*, 5 Ch. D. 776.

A bequest of a certain sum described as the amount in which the legatee is indebted to the testator would entitle the legatee to the sum given, though the debt may be paid before the death of the testator. *Vickers v. Pound*, 6 H. L. 885.

A direction that a debtor is to be released from all claims in respect of moneys "now owing" to the testator, and all other moneys due from him, will release the debtor from advances made subsequent to the date of the will. *Everett v. Everett*, 7 Ch. D. 428: see pp. 98, 162.

Railway shares.

Under the description railway shares, shares and stock will pass together. *Morrice v. Aylmer*, L. R. 10 Ch. 148; *ib.* 7 H. L. 717, overruling *Oakes v. Oakes*, 9 Ha. 666.

Mining shares.

As to the meaning of mining shares, see *Duchess of Cleveland v. Meyrick*, 37 L. J. Ch. 125.

Foreign bonds.

Foreign bonds will not include colonial bonds. *Hull v. Hill*, 4 Ch. D. 97; and see *Cadett v. Earle*, 46 L. J. Ch. 798.

Plate.

A gift of plate does not include plated articles. *Holden v. Ramsbottom*, 4 Giff. 205.

Furniture.

Furniture *prima facie* includes only such furniture as is reserved for domestic or personal use. *Farrant v. Spencer*, 1 Ves. sen. 97; *Pratt v. Jackson*, 2 P. Wms. 302; 1 Bro. P. C. 222; *Manning v. Purcell*, 2 Sm. & G. 284; 7 D. M. & G. 55; *Domville v. Taylor*, 32 B. 604.

It includes plate and probably ornaments; but not wine or books or tenant's fixtures. *Kelly v. Powlett*, Amb. 605; *Porter v. Tournay*, 3 Ves. 311; *Field v. Peckett*, 9 W. R. 526; *Finney v. Grice*, 10 Ch. D. 13; see, too, *Cole v. Fitzgerald*, 1 S. & St. 189; 3 Russ. 301; *Birch v. Dawson*, 2 A. & E. 37; see *In re Londesborough*; *Bridgman v. Fitzgerald*, 50 L. J. Ch. 9.

A gift of furniture in a house passes only the furniture permanently kept there. *Wilkins v. Jodrell*, 11 W. R. 588.

Chattels in a house.

A bequest of chattels in a house will not pass choses in



action, such as bonds or securities for money in the house, which are considered not property in the house, but evidence of title to property elsewhere. *Green v. Symonds*, 1 B. C. C. 139; *Lady Aylesbury's Case*, 11 Ves. 662; *Chapman v. Hart*, 1 Ves. sen. 271; *Moore v. Moore*, 1 B. C. C. 127; *Fleming v. Brook*, 1 Sch. & L. 318; *Brooke v. Turner*, 7 Sim. 671; *Hertford v. Lowther*, 7 B. 1; see *Turner v. Turner*, 28 W. R. 859; 14 Ch. D. 829.

Bank notes will pass under such a bequest. *Popham v. Lady Aylesbury*, Amb. 68; *Brooke v. Turner*, *supra*.

A gift of articles in or about the testator's mill has been held not to pass a cargo of wheat in course of transit at the testator's death. *Lane v. Sewell*, 43 L. J. Ch. 378.

A gift of property in a county has been held to pass debts due from persons living in the county. *Earl of Tyrone v. Marquis of Waterford*, 1 D. F. & J. 613.

The devisee of land is entitled to the emblements, unless they are expressly given away, and a general residuary bequest is not sufficient for this purpose. *Cooper v. Woolfit*, 5 W. R. 790; 2 H. & N. 122; see *Blake v. Gibbs*, 5 Russ. 13 n. Emblements.

Under the term stock, growing crops will pass to the devisee of the land where they grow. *Blake v. Gibbs*, 5 Russ. 13 n. Farming stock.

If the farm is devised to A and the stock to B., growing crops will pass to B. whether the gift of the stock is coupled with the general personal estate or not. *Cox v. Godsalve*, 6 East, 604 n.; *West v. Moore*, 8 East, 339; *Rudge v. Winnal*, 12 B. 357; *In re Roose*; *Evans v. Williamson*, 29 W. R. 230, overruling *Vaisey v. Reynolds*, 5 Russ. 12; and see *Harvey v. Harvey*, 32 B. 441; *Creagh v. Creagh*, 13 Ir. Ch. 28; *Burbidge v. Burbidge*, 16 W. R. 76.

As to the meaning of plant and goodwill, see *Blake v. Shaw*, Jo. 732; *Churton v. Douglas*, *ib.* 174; as to live and dead stock, *Hutchinson v. Smith*, 11 W. R. 417. Plant and goodwill; live and dead stock.

For the meaning of the word patrimony, see *Green v. Giles*, 5 Ir. Ch. 25.

**Legacy.** The word legacy is primarily applicable to personalty only.

It does not apply to land given on trust for sale and division, but it does to a legacy charged on real estate. *White v. Lake*, 6 Eq. 188; *Hodges v. Grant*, 4 Eq. 140.

But it may refer to realty if there is nothing else to which it can refer. *Hope d. Brown v. Taylor*, 1 Burr. 268; *Hardacre v. Nash*, 5 T. R. 716.

**Legatee.** Similarly, the appointment of a residuary legatee will only give him personal property. *Windus v. Windus*, 21 B. 373; 6 D. M. & G. 549; *Hillas v. Hillas*, 10 Ir. Eq. 134; *Re Giles*, 14 Ir. Ch. 311; *Kellett v. Kellett*, 3 Dow. 248; *Cooney v. Nicholls*, 7 L. R. Ir. 107.

**When the residuary legatee takes realty.** But the appointment of a person "residuary legatee of all my property" will give him realty. *Warren v. Newton*, Drury, 464; *Day v. Davenport*, 12 Sim. 200; *Davenport v. Coltman*, 9 M. & W. 481; 12 Sim. 588.

So, too, if the testator expresses an intention of disposing of all his real and personal estate, and then appoints a residuary legatee. *Pitman v. Stevens*, 15 East, 505.

Probably if the testator, after making certain devises, appoints a residuary legatee, real estate would pass to him. At any rate, this is the case if the testator prefaces his will with the expression of an intention to dispose of his estate, which must mean his whole estate. *Hughes v. Pritchard*, 6 Ch. D. 24.

The testator may show that he includes realty in the residuary gift by a direction not to sell a house till the death of the tenant for life, on whose death the property becomes divisible among the residuary legatees. *Davenport v. Coltman*, 9 M. & W. 481.

When realty and personalty are made a mixed fund for the payment of legacies, it seems the residuary legatee will take everything that remains. *Evans v. Crosbie*, 15

Sim. 602; *Wildes v. Davies*, 1 Sm. & G. 475; see *post*, pp. 194—197.

So where there is an absolute direction to sell the testator's real estate and he disposes of the proceeds of his property, the appointment of a residuary legatee gives him the residue of the proceeds of sale of the realty. *Singleton v. Tomlinson*, 3 App. C. 404.

The word legacies includes annuities. *Bromley v. Annuities*  
*Wright*, 7 Ha. 334; *Ward v. Grey*, 26 B. 485; *Mullins v. legacies.*  
*Smith*, 1 Dr. & S. 204; *Heath v. Weston*, 3 D. M. & G. 601; *Sibley v. Perry*, 7 Ves. 522.

And the term pecuniary legacies would also, it would seem, include annuities. *Gaskin v. Rogers*, L. R. 2 Eq. 284.

But if the testator expressly distinguishes between legatees and annuitants, legacies will not include annuities. *Gaskin v. Rogers*, *supra*; *Weldon v. Bradshaw*, L. R. 7 Eq. 168.

It seems the term legacy does not *prima facie* include a gift of residue, though legatee would include a residuary legatee. *Ward v. Grey*, 26 B. 485.

The term manor comprises the demesne lands, including Manor. the waste of the manor and the freehold inheritance of the customary lands held of the manor, the services of freehold tenants of the manor, and the right to hold a Court Baron and a customary Court.

There may also be included in the manor certain franchises, such as a Court leet, treasure trove, wreck of the sea, and the like. See Elton on Copyholds, p. 13.

The term of course includes allotments made to the lord under an Inclosure Act in respect of his right in the soil. Such lands are already parcel of the manor, and the effect of the inclosure is only to free them from customary and prescriptive rights. *Hicks v. Sallitt*, 2 W. R. 173; 3 D. M. & G. 782.

Further, the word manor includes copyhold tenements of the manor purchased by the lord, though the lord's equitable title may not be perfect. *Hicks v. Sallitt, supra.*

Freehold lands held of the manor may again become parcel of the manor by escheat. *Delacherois v. Delacherois*, 13 W. R. 24; 11 H. L. 62.

Manor  
does not  
include  
purchased  
freeholds.

But freehold lands held of the manor and purchased by the lord do not thereby become parcel of the manor, so as to pass by the description manor, though no doubt they might become parcel of the manor by reputation. *Delacherois v. Delacherois, supra*; *R. v. Duchess of Buccleuch*, 6 Mod. 151.

Rents from  
mines.

A devise under a power of the surface to A. and the mines to B. carries to the surface owner accumulations of rents down to the testator's death derived from the mines under a lease under the Settled Estates Act, the money being subject to investment in land under the Act. *In re Scarth*, 10 Ch. D. 499.

Advow-  
sons.

If an advowson is directed to be sold and the proceeds invested for the benefit of a tenant for life, the tenant for life is entitled to present upon a vacancy occurring before sale. *Briggs v. Sharp*, 20 Eq. 317.

If the proceeds of sale are divisible among tenants in common, the right of presentation before the advowson is sold will be determined by lot. *Johnstone v. Baber*, 4 W. R. 827; 6 D. M. & G. 439.

Living.

The word living is ambiguous, and may mean either the advowson or the next presentation. If the devise is coupled with words showing that the testator contemplated personal enjoyment by the devisee, and there are no words of inheritance, the next presentation alone passes. *Webb v. Byng*, 4 W. R. 657; 2 K. & J. 669.

Where there is a devise of lands and advowsons to trustees upon trusts to apply the rents, issues and profits during a given period to certain purposes, the proceeds of sale of a

next presentation during that period are not undisposed of so as to pass to the heir at law. *Earl of Albemarle v. Rogers*, 7 B. P. C. 522; *Cust v. Middleton*, 13 W. R. 249.

A devise of freehold or leasehold ground rents passes the reversion. *Maundy v. Maundy*, 2 Stra. 1020; *Kaye v. Laxon*, 1 B. C. C. 76.

The term messuage or house will pass the orchard garden and curtilage. Co. Lit. 5 b.; *Carden v. Tuck*, Cro. El. 89; 3 Leon. 214, pl. 283; see *Lombe v. Stoughton*, 18 L. J. Ch. 100.

It will also pass a piece of land or a cellar severed from the house, but near it and necessary for the convenient use of it. See *Hibon v. Hibon*, 11 W. R. 455; 32 L. J. Ch. 374; *Doe v. Collins*, 2 T. R. 498; *Steele v. Midland Ry. Co.*, 1 Ch. 275, p. 289.

If the testator in one part of his will gives a house and lands, and in another part uses the word house only, probably the latter devise would not carry land occupied with the house. *Buck d. Whalley v. Nurton*, 1 B. & P. 53; see 1 Bing. 498; *Roe d. Walker v. Walker*, 3 B. & P. 375.

A devise of a house with its appurtenances probably has no wider meaning than a devise of a house alone. Such a devise will pass everything naturally belonging to the enjoyment of the house, such as a garden and orchard and a small piece of land occupied with the house. *Boocher v. Samford*, Cro. El. 113; *Doe d. Lemprière v. Martin*, 2 W. Bl. 1148; *Buck d. Whalley v. Nurton*, 1 B. & P. 53.

But land will not pass as appurtenant to a house or to other lands. See Plowd. 169 a, 170; Co. Lit. 121 b.; *Hearn v. Allen*, Cro. Car. 57; *Lister v. Pickford*, 34 B. 576.

If the devise is of certain property with the lands appertaining or belonging thereto, this is not to be taken in the strict sense of appurtenant, but in the sense of usually occupied therewith. *Hill v. Grange*, 1 Plow. 170; *Dyer*,

130 b.; *Ongley v. Chambers*, 1 Bing. 483; *Doe d. Gore v. Langton*, 2 B. & Ald. 680.

Use and  
occupa-  
tion.

A gift of the use and occupation of a house does not involve a personal use so as to prevent the donee from letting. *Rabbeth v. Squire*, 4 De G. & J. 406; *Mannox v. Greener*, 14 Eq. 456.

But a gift over, if the donee ceases to occupy the house, shows that the testator contemplated a personal use. *Mac-laren v. Stainton*, 27 L. J. Ch. 442; 4 Jur. N. S. 199.

Use of  
plate.

A gift of the use of plate following a gift of other articles to the same legatee in absolute terms has been held a gift for life only. *Espinasse v. Luffingham*, 3 J. & L. 186.

For the meaning of a gift of the use of book debts and capital, see *Terry v. Terry*, 12 W. R. 66.

Devise of  
a house as  
occupied  
by A.

A devise of a house as occupied by A. will not pass a merely occasional easement enjoyed by A. over other property of the testator, though the words "as enjoyed by A." might. *Pollden v. Bastard*, L. R. 1 Q. B. 156; *Bodenham v. Pritchard*, 1 B. & C. 350.

Right of  
way.

Where a testator devises a piece of land to A., and another piece of land to B., and the only access to the latter is over the former, B. is entitled to a right of way over A.'s land.

If the testator has himself used a certain way for purposes of access to B.'s land, that will be the way to which A. is entitled. *Pearson v. Spencer*, 1 B. & S. 571; 3 B. & S. 761.

If no way can be said to have been used by the testator for the purpose of access to the land-locked land, it would seem that the owner of the servient tenement would be entitled to set out the way, subject to the restriction that taking all the circumstances into consideration it must be a reasonable way. See *Bolton v. Bolton*, 11 Ch. D. 968; and as to the user of the way, see *Corporation of London v. Riggs*, 13 Ch. D. 798.

The proper legal meaning of "the premises" is *præ-missa*, but it may be used in a popular sense as a description of certain property, as in the phrase house and premises; in such a case it will only include property in connection with the particular property mentioned. *Sanford v. Irby*, 4 L. J. Ch. 23; *Lethbridge v. Lethbridge*, 3 D. F. & J. 523; 4 *ib.* 35; *Read v. Read*, 15 W. R. 165.

## II. WORDS APPROPRIATE TO REALTY AND PERSONALTY RESPECTIVELY.

Under the words *personal* property, estate, and effects, personal property alone passes. *Belaney v. Belaney*, L. R. 2 Eq. 210; 2 Ch. 138; *Jones v. Robinson*, 3 C. P. D. 344.

And possibly the word property would not pass realty if it is coupled with explanatory words relating only to personalty, such as "both in stock, household furniture, cash, &c., &c." *Mullally v. Welsh*, I. R. 6 C. L. 314; see 3 L. R. Ir. 244.

1. The words estate or property alone are, however, sufficient to carry real estate. *Mayor of Hamilton v. Hodsdon*, 6 Moo. P. C. 76; 11 Jur. 193; *Hawksworth v. Hawksworth*, 27 B. 1. Words estate or property alone will pass realty,

Where these words are coupled with other words which would alone be sufficient to carry the whole of the personal property, the word estate will, *primâ facie*, carry realty, as it would otherwise be insensible. *Tilley v. Simpson*, 2 T. R. 659 n.; *Edwards v. Barnes*, 2 Bing. N. C. 252; *Doe d. Walls v. Langlands*, 14 East, 370; *Jongsma v. Jongsma*, 1 Cox, 362; *Patterson v. Huddart*, 17 B. 210; *Hamilton v. Buckmaster*, L. R. 3 Eq. 323; *Sanderson v. Dobson*, 7 C. B. 81, and 10 B. 47, overruling same case, 1 Ex. 141; and see *Dobson v. Bowness*, 5 Eq. 404; *Loftus v. Stoney*, 17 Ir. Ch. 178. where coupled with other words.

If there are any words in the gift accurately applic-

able to realty, such as "devise," the fact that the trusts declared are only applicable to personalty will not prevent the real estate from passing. *Doe d. Burkitt v. Chapman*, 1 H. Bl. 223; *Dunnage v. White*, 1 J. & W. 583; *Stokes v. Salomons*, 9 Ha. 75; *Lloyd v. Lloyd*, 7 Eq. 458; *Longley v. Longley*, 13 Eq. 133.

Real estate will pass even if there are no words technically appropriate, and the trusts declared are not literally applicable to realty, if they can be held popularly applicable. *Saumarez v. Saumarez*, 4 M. & Cr. 331; *D'Almaine v. Moseley*, 1 Drew. 632; *Morrison v. Hoppe*, 4 De G. & Sm. 234.

Thus the words "collect and get in" will not prevent realty from passing. *Hamilton v. Buckmaster*, L. R. 3 Eq. 323.

Trust for  
sale.

So, too, if the trust is for sale or investment, the inapplicability of the subsequent trusts to realty is immaterial. *O'Toole v. Browne*, 3 E. & B. 572; *Streatfield v. Cooper*, 27 B. 338; *Fullerton v. Martin*, 22 L. J. Ch. 893; *Dobson v. Bowness*, 5 Eq. 404. See, too, *Affleck v. James*, 17 Sim. 121.

If, however, the gift is to trustees, their executors, administrators and assigns, on trusts exclusively applicable to personalty, real estate will not pass. *Doe d. Spearing v. Buckner*, 6 T. R. 610; *Pogson v. Thomas*, 6 Bing. N. C. 337; *Coard v. Holderness*, 20 B. 147.

Estate  
coupled  
with words  
insufficient  
to pass  
personalty.

It has sometimes been said, that if the words with which the word "estate" is coupled are not sufficient to carry all the personal property, estate will be confined to personalty. See *Tilley v. Simpson*, 2 T. R. 659 n.; *D'Almaine v. Moseley*, 1 Dr. 632. The rule appears, however, to be unsupported by actual decision, and has been disapproved of. See *Loftus v. Stoney*, 17 Ir. Ch. 178; *Re The Greenwich Hospital Improvement Act*, 20 B. 458.

At any rate, where there is a prior devise of lands a gift



of the "rest and residue of my estate," or "all other my estate," though coupled with words which would not alone carry all the personalty, will carry realty. *Scott v. Alberry*, Com. 337; 8 Vin. Abr. 229, pl. 14; *Fletcher v. Smiton*, 2 T. R. 656.

Of course where the testator shows that he uses the word estate as equivalent to effects, only personalty will pass. *Timewell v. Perkins*, 2 Atk. 102; *Doe d. Hurrell v. Hurrell*, 5 B. & Ald. 18.

2. A devise of "real estate of which I may die seised" <sup>Seised.</sup> will not pass lands which at the testator's death are in the wrongful possession of strangers. *Leach v. Jay*, 6 Ch. D. 496; 9 Ch. D. 42.

3. The words "whatever I may die possessed of" alone <sup>What I may die possessed of.</sup> would probably carry realty.

At any rate this is clearly the case where they are coupled with words sufficient to carry the whole personalty. *Evans v. Jones*, 46 L. J. Ex. 280.

It makes no difference that the person to whom the gift is made is also appointed executor. *Pitman v. Stevens*, 15 East, 505; *Wilce v. Wilce*, 5 M. & P. 682; 7 Bing. 664; *Thomas v. Phelps*, 4 Russ. 348.

*Monk v. Maudsley*, 1 Sim. 286, and *Cook v. Jaggard*, L. R. 1 Ex. 125, were both cases before the Wills Act in which the question was whether the words, "whatever I die possessed of," would pass the fee to a devisee to whom specific devises for life and in tail had already been made.

4. The words "all the rest," though following gifts of <sup>All the</sup> personalty, will pass realty. *Atree v. Atree*, 11 Eq. 280; <sup>rest.</sup> *Smyth v. Smyth*, 8 Ch. D. 561.

5. The word effects *prima facie* will not pass real <sup>Effects.</sup> estate. *Doe v. Dring*, 2 Mau. & S. 448; *Doe d. Haw v. Earles*, 15 M. & W. 450; see, however, *Smyth v. Smyth*, *supra*; *A.-G. of British Honduras v. Bristowe*, 50 L. J. P. C. 15.

But the testator may show that he intended realty to pass by the word effects, by referring, for instance, to property including realty as "such effects." *Marquis of Titchfield v. Horncastle*, 2 Jur. 610; *Milsome v. Long*, 3 Jur. N. S. 1073.

The words effects both real and personal will pass realty. *Hogan v. Jackson*, 3 B. P. C. 388; Cowp. 299.

**Chattels.** 6. On the other hand, chattels real and personal, *prima facie*, will not, unless explained by the context. *Grayson v. Atkinson*, 1 Wils. 333.

7. The expression worldly goods of what nature and kind soever passes realty. *Wright v. Shelton*, 18 Jur. 445.

8. The appointment of a person executor of the testator's property has been held sufficient to give him the fee in real estate. *Doe d. Hickman v. Haslewood*, 6 A. & E. 167; *Doe d. Pratt v. Pratt*, *ib.* 180; *Murphy v. Donnelly*, 1 R. 4 Eq. 111.

**Locality of personality.** 9. For the construction of bequests of personality described with reference to a particular locality, see *Earl of Tyrone v. Marquis of Waterford*, 1 D. F. & J. 613; *Ashton v. Horsfield*, 2 Jur. N. S. 193; 6 *ib.* 355; *In bonis Ewing*, 50 L. J. P. 11.

## CHAPTER XIX.

## THE EFFECT OF A DEVISE IN GENERAL TERMS.

## I. FREEHOLDS.

IN wills, prior to the Wills Act, a residuary devise included only lands possessed by the testator at the date of his will, and of which he had not attempted to make any disposition by his will.

Operation  
of a  
general  
devise on  
freeholds  
before the  
Wills Act.

It included, therefore, the reversion in lands in which partial interests only had been previously given. *Rooke v. Rooke*, 2 Vern. 461; 1 Eq. Ab. 210, pl. 17; *White v. Vitty*, 2 Russ. 484; 4 Russ. 584.

And in the case of contingent and executory devises it included the interest undisposed of in the event of those devises not taking effect, or until they took effect, but not lapsed or void devises. *Doe d. Wells v. Scott*, 3 Mau. & S. 300; *Egerton v. Massey*, 3 C. B. N. S. 338.

Now by the 25th section of the Wills Act, real estate comprised in any devise which shall fail or be void shall be included in a residuary devise.

And by the 24th section every will shall be construed with reference to the real and personal estate comprised in it, to speak and take effect as if it had been executed immediately before the death of the testator, unless a contrary intention shall appear by the will.

Wills Act  
makes the  
will speak  
from the  
death.

The section probably does not apply to property excepted out of a devise. Thus, where a testator excepts from a devise property subject to the trusts of a settlement, and afterwards conveys other property upon the trusts of the settlement, the latter property is not excepted from the devise. *Hughes v. Jones*, 11 W. R. 898; 1 H. & M. 765.

**What is a contrary intention.** A contrary intention is not sufficiently manifested by a gift of the freeholds, "to which I *am* entitled," though there may be a subsequent devise of copyholds "to which I am or at the time of my death shall be entitled." *Ld. Lilford v. Powys Keck*, 30 B. 300.

**Use of the word "now."** The fact that the testator gives property he "now" possesses, or that the property is described as "now" charged with certain sums, will not exclude after acquired property. *Wagstaff v. Wagstaff*, 8 Eq. 229; *Hepburn v. Skirving*, 4 Jur. N. S. 651; *In re Ord*; *Dickinson v. Dickinson*, 12 Ch. D. 22.

But if the testator expressly distinguishes between the two periods by giving such freeholds and leaseholds as are now vested in me, "or as to the said leasehold premises as shall be vested in me at the time of my death," the word now must be referred to the date of the will. *Cole v. Scott*, 1 Mac. & G. 518; 1 H. & T. 477. See pp. 98 and 150.

## II. REVERSIONS.

**Reversions pass under a general devise.** 1. Reversions, whether vested in the testator at the time of making his will or remaining in him after the limitations of his will are exhausted, pass by a general devise of lands. *Chester v. Chester*, 3 P. W. 56; *Doe d. Moreton v. Fossick*, 1 B. & Ad. 186; *Mostyn v. Champneys*, 1 Scott, 293; 1 Bing. N. C. 341.

**Devise of lands not settled includes a reversion in settled lands.** 2. A devise of lands not settled, or out of settlement, is equivalent to a devise of lands not otherwise disposed of, over which the testator has absolute dominion, and will therefore pass a reversion in fee in settled lands, though the testator may confirm the settlement. *Incorporated Society v. Richards*, 1 Dr. & War. 258; *Chester v. Chester*, 3 P. W. 56; *A.-G. v. Vigors*, 8 Ves. 256; *Jones v. Skinner*, 5 L. J. Ch. 87; *Kelly v. Duffy*, 4 L. R. Ir. 601.

A charge of annuities upon the lands passing by the general words will not exclude reversions. *Doe d.*

*Moreton v. Fossick*, 1 B. & Ad. 186; *Doe d. Pell v. Jeyes*, 1 B. & Ad. 593.

3. The fact that the limitations on which the reversion is dependent are such that some of the limitations of the will cannot take effect upon the reversion, will not prevent the reversion from passing. though some of the limitations are inappropriate to the reversion.

If there are other lands besides the reversion the limitations inapplicable to the reversion will be referred to the other lands *reddendo singula singulis*. *Doe d. Earl Cholmondeley v. Weatherby*, 11 East, 322; *William d. Hughes v. Thomas*, 12 East, 141; *Freeman v. Duke of Chandos*, Cowp. 363; *Doe d. Nethercote v. Bartle*, 5 B. & Ald. 492; *Morris v. Lloyd*, 33 L. J. Ex. 202.

And under this head would come all wills since the Wills Act, where such of the limitations as can never take effect upon the reversion may be looked upon as intended to operate upon after-acquired lands.

And even if there are no other lands the reversion will pass if some of the limitations of the will are applicable to it. *Church v. Mundy*, 12 Ves. 426; *Tennent v. Tennent*, Dru. temp. Sugden, 161; 1 Jo. & Lat. 379; *Ford v. Ford*, 6 Ha. 486; *Roe d. James v. Avis*, 4 T. R. 605. *Goodtitle d. Daniel v. Miles*, 6 East, 494, must be considered overruled.

4. If, however, none of the limitations of the will could take effect upon the reversion, there seems no reason for supposing the reversion would pass. *Tennent v. Tennent*, *supra*, is not *contra*, since the devise of the reversion was capable of taking effect so far as the life interest given to R. was concerned. *Goodtitle d. Daniel v. Miles*, *supra*, seems to have been decided upon this principle, though the facts did not justify its application. Whether a reversion passes if all the limitations are inappropriate.

5. And, of course, the reversion will not pass if the testator expressly treats it as undisposed of by his will; if, for instance, he treats the estates in which he has a

reversion as descendible on failure of the prior limitations. *Strong v. Teatt*, 2 Burr. 912; 3 B. P. C. 219.

### III. LEASEHOLDS FOR LIVES.

Leaseholds  
for lives.

The same rules are applicable to leaseholds for lives, which, being freehold interests, pass under a general devise though some of the limitations are inapplicable. *Fitzroy v. Howard*, 3 Russ. 225; *Weigall v. Broome*, 6 Sim. 99.

### IV. COPYHOLDS.

Copyholds. By the statute 55 Geo. 3, c. 192, and sections 3 and 4 of the Wills Act, copyholds, whether surrendered to the use of the will or not, pass by a general devise. *Doe d. Clarke v. Ludlam*, 7 Bing. 275; 5 Moo. & P. 48.

The effect of section 3 of the Wills Act is only to dispense with the necessity for a surrender, and not to convey the estate into the devisee without admission. The estate therefore remains in the customary heir till admittance. *Garland v. Mead*, L. R. 6 Q. B. 441.

Equitable  
estates in  
copyholds.

Before the statute of 55 Geo. 3, equitable estates of copyholds which could not be surrendered could be devised by words of direct reference: *Allen v. Poulton*, 1 Ves. sen. 121; but they did not pass by a general devise of lands; but now, as the evidence of intention to pass copyholds inferred from a surrender is unnecessary, it seems they would pass under a general devise. See *per* Lord Cranworth, in *Torre v. Browne*, 5 H. L. 555, 574.

And by the effect of the 3rd section of the Wills Act, a general devise of lands will pass copyholds, freed from the widow's right to freebench, as such right would have been barred prior to the passing of that section by a surrender. *Lacey v. Hill*, 19 Eq. 346.

## V. LEASEHOLDS FOR YEARS.

A general devise of lands before the Wills Act does <sup>Leaseholds for years before the Wills Act.</sup> not carry leaseholds for years if there are any freeholds; on the other hand, if there are no freeholds, leaseholds may pass. *Rose v. Bartlett*, Cro. Car. 292; *Thompson v. Lawley*, 2 B. & P. 303; *Gully v. Davis*, 10 Eq. 562.

Leaseholds will, however, pass under the description <sup>Words of description applicable to leaseholds.</sup> lands which the testator "then stood seised or possessed of, or in any way interested in." *Addis v. Clement*, 2 P. W. 456.

The word possessed is the important word, and leaseholds have been held not to pass under a similar devise without the word possessed. *Pistol v. Riccardson*, 2 P. W. 459 n.; *Davis v. Gibbs*, 3 P. W. 26.

The word farm will pass a leasehold as well as a free- Farm. hold portion, unless it is restricted by the addition of "all other my freehold lands." *Lane v. Stanhope*, 6 T. R. 345; *Arkell v. Fletcher*, 10 Sim. 299; *Holmes v. Sayer Milward*, 47 L. J. Ch. 522. See *ante*, p. 97.

So, too, land held on lease and attached to a freehold house, passes under "messuages or tenements with the appurtenances." *Hobson v. Blackburn*, 1 M. & K. 571; *Doe v. Martin*, 2 W. Bl. 1148.

And leaseholds pass where the devise is to certain persons to hold for ever, or otherwise according to the natures and tenures thereof. *Hartley v. Hurle*, 5 Ves. 540; *Swift v. Swift*, 1 D. F. & J. 160.

The same result follows if the lands are described by acreage, which can only be satisfied by including leaseholds. *Goodman v. Edwards*, 2 M. & K. 759.

Since the Wills Act, however, leaseholds pass under <sup>General devise since the Wills Act.</sup> a general devise of lands unless there is a contrary intention.

Contrary  
intention.

Such a contrary intention is not shown by the fact that the "lands" in question are devised in strict settlement without any provision to prevent the leaseholds from vesting indefeasibly in the first tenant in tail at his birth. *Wilson v. Eden*, 11 B. 237, 5 Ex. 752, 14 B. 317, 18 Q. B. 474, 16 B. 153.

But if there is a direction to accumulate the rents and profits during the minority of a tenant for life or in tail, and if he attains twenty-one to pay the accumulations to him, or if he dies under twenty-one to invest them in freehold land, to be settled to the same uses—a direction inconsistent with the absolute vesting of the leaseholds in a tenant in tail at birth,—and a power of selling the "lands" and investing the proceeds in leaseholds, to be settled upon the same trusts, but so that they shall not vest in any tenant in tail dying under twenty-one, and there is a gift of the residuary personal estate upon trusts corresponding with the uses of the devised lands with the same proviso against absolute vesting, the testator by the provisions against the vesting of leaseholds in any tenant in tail dying under twenty-one shows that he would have inserted similar provisions in the devise of the "lands," unless he had intended leaseholds not to pass under that name. *Prescott v. Barker*, L. R. 9 Ch. 174.

Leaseholds  
will not  
pass under  
the term  
freehold  
lands or  
real estate.

A devise of "freehold" lands, or of "real" estate is not affected by the 24th section of the Wills Act. *Stone v. Greening*, 13 Sim. 390; *Emuss v. Smith*, 2 De G. & Sm. 722; *Turner v. Turner*, 21 L. J. Ch. 843.

Under such a devise, therefore, leaseholds will pass only if there are no freeholds. *Day v. Trig*, 1 P. W. 286; *Doe d. Dunning v. Cranstoun*, 7 M. & W. 1; *Gully v. Davis*, 10 Eq. 562.

In this respect the Wills Act, since which after-acquired freeholds might pass, will not prevent leaseholds from



passing where there are no freeholds. *Nelson v. Hopkins*, 21 L. J. Ch. 410; *Gully v. Davis*, 10 Eq. 562; *Moase v. White*, 3 Ch. D. 763.

And where the testator was possessed of a leasehold interest, and also of the reversion in fee from the expiration of three years after the end of the term in certain premises, the whole interest has been held to pass under the word freehold. *Matthews v. Matthews*, 4 Eq. 278.

## VI. BENEFICIAL INTEREST IN A MORTGAGE.

A general devise of lands will not without more pass the beneficial interest in a mortgage. *Strode v. Russell*, 2 Vern. 621, 624; *Casborne v. Scarfe*, 1 Atk. 605; see 2 J. & W. 194. See *Martin d. Weston v. Mowlin*, 2 Burr. 969, where the testator was mortgagee in possession. Beneficial interest in a mortgage.

But a devise of particular lands of which the testator is only mortgagee to several persons in succession, would, it seems, pass the beneficial interest, as something was clearly intended to pass, and the limitations are inappropriate to a devise of the mere legal estate. *Woodhouse v. Meredith*, 1 Mer. 450. See, too, *Knollys v. Shepherd*, 1 J. & W. 499; *Clarke v. Abbott*, Barn. Ch. 457, 461.

Where the testator was owner in fee of a house subject to a lease, and at the same time mortgagee of the lease, the mortgage debt was held not to pass by a devise of "my freehold house." *Bowen v. Barlow*, 11 Eq. 454; 8 Ch. 171.

Rent charges upon a house which were conveyed on the occasion of the purchase by the testator of the lease to a trustee for him, would probably pass by a devise of the house. *Vallance v. Vallance*, 2 N. R. 229; see *Wilkes v. Collin*, 8 Eq. 338; *Swinfen v. Swinfen*, 29 B. 199, 204.

## VII. TRUST AND MORTGAGE ESTATES.

Legal estate in trust and mortgage estates.

A general devise to a person absolutely without more will pass the legal estate in property of which the testator is trustee or mortgagee. *Lord Braybrooke v. Inskip*, 8 Ves. 417.

There is, however, a distinction between cases where the testator is mortgagee in trust, and where he is also beneficially entitled to the mortgage money.

Where the testator is mortgagee and beneficially entitled to the mortgage money.

1. Where the testator has the legal estate in a mortgage, and the beneficial interest is also vested in him, the legal estate passes under a gift of "all the rest of my real and personal estate to A. for her own use and benefit," though there may be a charge of debts. *Re Stevens' Will*, 6 Eq. 597. In such a case it is reasonable to suppose that the beneficial ownership and the legal estate were meant to go together.

If the devise is to trustees, subject to a charge of debts, apparently the legal estate would not pass, the argument from the convenience of uniting the legal estate with the beneficial interest being away. *Re Horsfell*, M'C. & Y. 292.

This is *a fortiori* the case where the devise is to trustees subject to the payment of debts upon trusts inapplicable to the legal estate. See *Packman v. Moss*, 1 Ch. D. 215, where the testator was beneficially interested in a moiety of the equity of redemption.

But if the trustees are directed to get in debts due on any security, they take the legal estate. *Re Arrowsmith's Trusts*, 6 W. R. 642.

The legal estate will not pass where the devise is after payment of debts to two persons as tenants in common. *Doe d. Roylance v. Lightfoot*, 8 M. & W. 553.

Or where it is to several persons in definite shares, though not subject to debts. *Martin v. Laverton*, 9 Eq. 563.

Or where it is to an indefinite class, as tenants in common. *Re Finney's Estate*, 3 Giff. 465.

2. Mere trust estates will not be prevented from passing under a general devise by words of benefit superadded. *Bainbridge v. Lord Ashburton*, 2 Y. & C. Ex. 347; *Sharpe v. Sharpe*, 12 Jur. 398; *Lewis v. Matthews*, L. R. 2 Eq. 177; and see *Ex parte Shaw*, 8 Sim. 159.

Mere trust estate.

But they will not pass if there is a charge of debts, whether by express words or by implication from a residuary devise where legacies have been previously given. *Doe d. Reade v. Reade*, 8 T. R. 118; *Duke of Leeds v. Munday*, 3 Ves. 348; *Hope v. Liddell*, 21 B. 183; *In re Bellis' Trusts*, 5 Ch. D. 504. See, however, *In re Brown & Sibly*, 3 Ch. D. 156.

Charge of debts.

Nor where the devise is on trust for sale. *Ex parte Marshall*, 9 Sim. 555; *Re Cautley*, 17 Jur. 124; *Morley's Will*, 10 Ha. 293; *In re Smith's Estate*, 4 Ch. D. 70.

Trust for sale.

Nor where the devise is to uses in strict settlement. *Thompson v. Grant*, 4 Mad. 438.

As to whether a devise to the separate use will prevent trust estates from passing, see *Lindsell v. Thacker*, 12 Sim. 178.

Separate use.

3. Where a testator has contracted to sell real estate, so that he is a constructive trustee of the legal estate, it will pass under a devise of trust estates, and not under a general devise upon trust for sale. *Lysaght v. Edwards*, 2 Ch. D. 499. *Purser v. Darby*, 4 K. & J. 41, only decides that where the estate contracted to be sold is specifically devised it is excepted from a general devise of trust estates.

Constructive trust.

If there is no devise of trust estates, the legal estate in lands contracted to be sold will pass under a general devise of real and personal estate upon trust to get in and dispose of the personalty, the legal estate being required

when there was nothing else at her death upon which the gift could operate (see *post*), and there seems to be no apparent reason why married women should in this respect differ from other persons.

Power  
vested in a  
married  
woman.

With regard to realty, it is clear that where a married woman has a power to appoint realty, a general devise of her real and personal property will pass the estate subject to the power, there being nothing else upon which the devise can operate. *Curteis v. Kenrick*, 3 M. & W. 461; 9 Sim. 443; *Churchill v. Dibbin*, 9 Sim. 447 n.

Where the property subject to the power is personalty, the cases go to this :

1. Where a married woman has a power of appointment, and no other property at the date of the will, but at her death there is some separate estate upon which the will can operate, a general gift will not execute the power. *Lovell v. Knight*, 2 Sim. 275, affirmed on appeal. *Lemprière v. Valpy*, 5 Sim. 108; *Evans v. Evans*, 23 B. 1.

2. But if at her death there is nothing upon which the will can take effect, the power will be executed. *Shelford v. Acland*, 23 B. 10, where, however, the will was since the Wills Act. *A.-G. v. Wilinon*, L. R. 2 Eq. 816. But *qu.* whether this would be the case with the will of a testator; see *supra*.

In wills  
before the  
Wills Act,  
and in all  
cases of  
special  
powers,  
there must  
be a refer-  
ence to the  
power or to  
the pro-  
perty sub-  
ject to the  
power.

With regard to personalty, therefore, as also to realty, where the case is not within the exception above mentioned, in wills before the Wills Act, in order to execute a general power, there must be a reference either to the power or to the property subject to the power.

And the same is the case with special powers, whether before or since the Wills Act. *Wildbore v. Gregory*, 12 Eq. 482; *Harvey v. Harvey*, 23 W. R. 478.

Where the power is referred to and only a portion of the fund subject to the power is specifically given, the rest

will pass under a general gift of the residue. *Re Comber's Trust*, 14 W. R. 172.

1. What is a sufficient reference to a power.

What is a sufficient reference to a power.

A ratification of the trusts of the settlement creating a power is no evidence of an intention to execute the power. *Re Bingle's Trust*, 26 L. T. N. S. 58.

A recital that a person is entitled to certain funds, over which the testator has a power of appointment, will not amount to an execution of the power in favour of that person. *Pennefather v. Pennefather*, 1 R. 7 Eq. 300; see *Lees v. Lees*, 1 R. 5 Eq. 549; see *In re Walsh's Trusts*, 1 L. R. Ir. 320.

A reference to a power as contained in a settlement of 1819, when the power was, in fact, contained in a resettlement of 1839, has been held a sufficient reference. *Re Wilmot*, 9 B. 644.

Probably words referring to property over which the testator has any "disposing power," would be sufficient to execute a general power of appointment. See *Thornton v. Thornton*, 20 Eq. 599; *Cooke v. Cunliffe*, 17 Q. B. 245.

General powers.

If the power is a special power, where there are words large enough to include everything belonging to the testator, the additional words, "or over which I have any power of disposition or control," may be referred to a special power if all the objects of the power are included in the gift, though the interest given may be larger than the power justifies, or though persons not objects of the power may be included as well. *Pidgely v. Pidgely*, 1 Coll. 255; *In re Teape's Trusts*, 16 Eq. 442; see *Bruce v. Bruce*, 11 Eq. 371; *Bulteel v. Plummer*, 6 Ch. 160.

Special powers.

This, however, does not apply to a power created after the date of the will, though the will may be subsequently republished. *Hope v. Hope*, 5 Giff. 13.

Power created after the date of the will.

A devise of property over which the testator has any "beneficial" power will not execute a special power if the

"Beneficial" power.

devise is in excess of the power. *Ames v. Cadogan*, 12 Ch. D. 868.

**Use of the words "my property."** When there is a reference to the power either in direct terms or because there is nothing else to which the testator's words can apply, the fact that the property is described as "my property" will not exclude the property subject to the power from passing. *Harvey v. Stracey*, 1 Dr. 73, 115; *Bailey v. Lloyd*, 5 Russ. 330.

**Effect of a charge of debts.** Nor will the fact that the bequest is made subject to the testator's debts, though the power may be a special power, where there is other property to which the charge of debts can apply. *Bailey v. Lloyd*, 5 Russ. 330; *Cowx v. Foster*, 1 J. & H. 30; *Ferrier v. Jay*, 10 Eq. 550; *In re Teape's Trusts*, 16 Eq. 442. *Clogstown v. Walcott*, 13 Sim. 523, is no longer law.

**Gift of property "over which I have any disposing power."** Whether a gift of property "over which I have any disposing power" without more will include property over which the testator has a special power of appointment seems doubtful.

It will not if there is an intention not to execute the power. *Cooke v. Cunliffe*, 17 Q. B. 245.

In *Thornton v. Thornton*, 20 Eq. 599, a gift of "all my property over which I have any disposing power" to the testator's wife for life and then to his children, and in default of children to his wife's brothers and sisters, was held, *reddendo singula singulis*, to execute two powers of appointment—one in favour of the testator's wife, the other of his children.

**Gift of legacies to objects of the power charged upon the fund subject to the power.** And where under a non-exclusive power exercised prior to the passing of the statute, 37 & 38 Vict. c. 37, the testatrix gave legacies to three of the objects of the power, and then gave all the residue of her property of whatever kind, and over which she had any power of appointment, to the other objects of the power, the power was held well executed, the legacies to the objects of the

power being charged on the residue. *Gainsford v. Dunn*, 17 Eq. 405.

So, too, where legacies are given to the objects of a power and the fund is then appointed to a person not an object of the power, subject to the legacies, the gift of the legacies operates as an appointment *pro tanto*. *Disney v. Crosse*, L. R. 2 Eq. 592.

2. Or again, a gift of the property subject to the power without reference to the power is sufficient to show an intention to execute the power. Reference to property subject to power.

But there must be no doubt on the face of the will that the testator is referring to some specific fund in existence at the time of making the will. There must be a reference to a specific fund.

Therefore, the fact that property of the same kind as that subject to the power is given merely in general terms—as, for instance, some particular kind of stock—will not execute the power, since the gift would be satisfied by purchasing the stock in question. *Webb v. Honnor*, 1 J. & W. 352; *Mattingley's Trusts*, 2 J. & H. 427.

Nor will the fact that legacies are given equal in amount to the fund subject to the power. *Jones v. Tucker*, 2 Mer. 533; *Davies v. Thorns*, 3 De G. & S. 347; *Forbes v. Ball*, 3 Mer. 437, is explained in *Davies v. Thorns*.

Nor that legacies are given largely in excess of the testator's estate, unless the property subject to the power is included in it. *Lowe v. Pennington*, 10 L. J. Ch. 83.

The bequest of certain specific articles subject to the power will not be sufficient to make the rest of the property subject to the power pass by general words. *Hughes v. Turner*, 3 M. & K. 666.

On the other hand where the testator uses words showing that he is disposing of a specific fund, the power will be executed. *Loundes v. Loundes*, 1 Y. & J. 445; *Sayer v. Sayer*, 7 Ha. 381; 3 Mac. & G. 607; *Rooke v. Rooke*, 2

Dr. & S. 38; *David's Trusts*, Johns. 495; *Gratwicke's Trusts*, L. R. 1 Eq. 176; *Fletcher v. Fletcher*, 7 L. R. Ir. 40.

And this is the case though some of the persons in whose favour the power is exercised are incapable of taking. *Gratwicke's Trusts*, *supra*; *Bruce v. Bruce*, 11 Eq. 371.

Where a specific fund is referred to, the fact that the fund subject to the power is misdescribed, or that the donee purports to appoint under a different power, makes no difference. *Mackinley v. Sison*, 8 Sim. 561; *Bruce v. Bruce*, 11 Eq. 371.

In the same way, where a portion of the property subject to the power is excepted out of a general gift, the rest of the property subject to the power passes. *Walter v. Mackie*, 4 Russ. 76; *Reid v. Reid*, 25 B. 469.

Where the power was a special power and the testator gave legacies out of the funds subject to the power, and then gave the residue of his property "after payment of the legacies" to the objects of the power, the residue was held to include the property subject to the power. *Elliott v. Elliott*, 15 Sim. 321.

But a mere gift of the "residue of my personal estate and effects" to an object of the power would not have this effect. *Butler v. Gray*, 5 Ch. 26.

An express disposition of property settled subject to a power of revocation and new appointment may have the effect of exercising the power of revocation. *Quin v. Armstrong*, I. R. 11 Eq. 161.

Effect of  
the 27th  
sect. of the  
Wills Act  
on general  
powers.

Section 27 of the Wills Act enacts that a general devise of the real estate of the testator, or of the real estate of the testator in any place or in the occupation of any person mentioned in his will or otherwise described in a general manner, shall be construed to include any real estate or any real estate to which such description shall extend (as the case may be) which he may have power to



appoint, in any manner he may think proper, unless a contrary intention shall appear by the will.

A general devise or bequest will not, under this section, execute a power of revocation and new appointment. *Pomfret v. Perring*, 18 B. 618; 5 D. M. & G. 775; *Palmer v. Newell*, 20 B. 32. Power of revocation.

A power to appoint by will only is a general power within the section. *Re Powell's Trust*, 18 W. R. 228; 39 L. J. Ch. 188. Testamentary power.

Special powers are of course not within the section. *Wildbore v. Gregory*, 12 Eq. 482; *Humphery v. Humphery*, 36 L. T. N. S. 90. Special powers.

The fact that the power is contained in a settlement made by the testator before the date of his will raises no presumption that the will was not intended to execute the power. *In re Clark's Estate*; *Maddick v. Marks*, 14 Ch. D. 422.

A contrary intention is not indicated by an express confirmation of the trusts of the instrument creating the power, where there is anything to which such confirmation can apply; as, for instance, other settled property or prior trusts of the property over which the testator has the power, though the property may be disposed of in default of appointment. *Lake v. Currie*, 2 D. M. & G. 536; *Hutchin v. Osborne*, 4 K. & J. 252; 3 De G. & J. 142. Contrary intention.

Nor by the fact that a life interest is given to a person when, if that person survives the testator, the power will be gone. *Thomas v. Jones*, 2 J. & H. 475; 1 D. J. & S. 63.

But it has been held that a gift of property "not otherwise disposed of" does not execute a power where the property subject to the power is disposed of in default of appointment. *Moss v. Harter*, 3 Sm. & G. 458, *sed qu.*; see *Bush v. Cowan*, 9 Jur. N. S. 429; 11 W. R. 395.

Effect of a  
general be-  
quest upon  
powers.

By the same 27th section it is further enacted that in like manner a bequest of the personal estate of the testator, or any bequest of personal property described in a general manner, shall be construed to include any personal estate or any personal estate to which such description shall extend (as the case may be) which he may have power to appoint, in any manner he may think proper, and shall operate as an execution of such power, unless a contrary intention shall appear by the will.

Real estate  
sold.

Under this section a residuary bequest has been held to execute a power over real estate which had been sold under powers of sale and reinvestment in land, but had not, at the death of the testatrix, been reinvested. *Chandler v. Pocock*, 15 Ch. D. 491. See *In re Kingston's Estate*, 5 L. R. Ir. 169.

And where a testator appointed under a general power certain settled estates and made a general bequest of personal estate, over which he had any power of appointment, it was held that the proceeds of portions of the settled estate sold with his consent before the date of the will passed under the general bequest of personal estate. *Gale v. Gale*, 21 B. 349; *Blake v. Blake*, 15 Ch. D. 481.

The section applies as well to a general residuary bequest as to a gift of a general pecuniary legacy. *Spooner's Trust*, 2 Sim. N. S. 129; *Clifford v. Clifford*, 9 Ha. 675; *A.-G. v. Brackenbury*, 1 H. & C. 782; *Hawthorn v. Sheddon*, 3 Sm. & G. 293; *Shelford v. Acland*, 23 B. 10; *Re Wilkinson*, 4 Ch. 587.

Effect  
upon a  
general  
power of a  
direction  
to pay  
debts.

A direction to executors to pay the testator's debts out of his personal estate operates as an execution of a general power in favour of the executor. *Wilday v. Barnett*, 6 Eq. 193.

A simple direction to pay debts without the appointment of an executor would have the same effect. *Laing v. Cowan*, 24 B. 112.

But the mere appointment of an executor would probably not be enough. *Per Wickens, V.-C., In re Davies' Trusts*, 13 Eq. 166.

By the combined effect of sections 24 and 27, a general power may be exercised by a general gift in a will made prior to the instrument creating the power, and it is now settled that a general devise or bequest executes a general power contained in a settlement subsequently made by the testator, though the will thereby makes the whole settlement nugatory. *Boyes v. Cook*, 14 Ch. D. 53, overruling *In re Ruding's Settlement*, 14 Eq. 266.

A subsequent power created by the testator will of course, *a fortiori*, be executed where the previous will expressly gives all property over which the testator has any power. *Patch v. Shore*, 2 Dr. & Sm. 589.

Or where the will expressly refers to the property, which is afterwards settled by the testator, who reserves to himself a power. *Stillman v. Weedon*, 16 Sim. 26; *Meredyth v. Meredyth*, L. R. 5 Eq. 565; *Cofield v. Pollard*, 3 Jur. N. S. 1203.

The same is the case where the power, though existing at the date of the will, is then only contingent, being given to the survivor of two persons of whom the testator is one. *Thomas v. Jones*, 2 J. & H. 475; 1 D. J. & S. 63. See pp. 72, 73, *ante*.

Where the settlor and testator were the same person and the power was to be executed by a last will, and the testator made a will before and another after the creation of the power, the latter purporting to be his last will, it was held that the first will was not meant to be an execution of the power. *Pettinger v. Ambler*, L. R. 1 Eq. 510.

It does not appear to have been decided that a mere general gift will execute a power subsequently given to the testator by third persons, though it would seem to follow upon principle.

But a general gift will not execute a power given to the testator by the will of a person who survives him. *Jones v. Southall*, 32 B. 31.

Whether an appointment takes the fund from the donees in default of appointment in all events.

An appointment to executors of a fund, over which the testator has a general power, takes the fund away from the donees in default of appointment, though some of the trusts declared by the testator may fail or trusts only exhausting part of the fund are declared. *Chamberlain v. Hutchinson*, 22 B. 444; *Keown's Estate*, 1 R. 1 Eq. 372; *Brickenden v. Williams*, 7 Eq. 310; *Wilkinson v. Schneider*, 9 Eq. 423; *Scriven v. Sandom*, 2 J. & H. 743; *In re Pinède's Settlement*, 12 Ch. D. 667.

A mere direction to pay debts will only operate as an execution of the power *pro tanto*, and will not make the property subject to the power part of the testator's general estate. *Laing v. Cowan*, 24 B. 112.

The testator may show that he did not intend to make the fund part of his general estate. Thus, where the testatrix was a married woman separated from her husband, an appointment to trustees was held not to make the fund part of her estate, as it would in that case have vested absolutely in her husband, since being married she could only dispose of it under the power, and therefore all subsequent dispositions of it as her absolute property would have been void. *Hoare v. Osborne*, 12 W. R. 661; 33 L. J. Ch. 586; 10 Jur. N. S. 694; the case is, however, of no authority; see 48 L. J. Ch. 743, and 3 L. R. Ir. 240.

And in *Easum v. Appleford*, 5 M. & Cr. 56, the decision proceeded on the ground that the testatrix distinguished between her own property and that subject to the power, and at the same time intended to leave nothing undisposed of.

Possibly where the testator expressly gives the settled property for life only, a general residuary gift to the executors will not have the effect of taking the fund away

from the persons entitled in default of appointment, so far as the trusts declared of the residue fail. *Bristow v. Skirrow*, 10 Eq. 1; see *In re De Lusi's Trusts*, 3 L. R. Ir. 232, 238.

A gift of residue directly to a donee, and not through the medium of a trust which, under the 27th section, operates as an appointment, will not take the fund subject to the power from the donee in default of appointment where the residuary gift lapses. *Re Davies' Trusts*, 13 Eq. 163; *In re De Lusi's Trusts*, 3 L. R. Ir. 232; see, too, *Biddulph v. Williams*, 1 Ch. D. 203; *In re Ickeringill*; *Hinsley v. Ickeringill*, 29 W. R. 500.

The rule applicable to personalty applies also to real estate, subject to a power, so that an appointment to trustees upon trust for a person, who predeceases the testator, takes the estate from the persons entitled in default of appointment. *In re Van Hagen*; *Sperling v. Rochfort*, 16 Ch. D. 18.

Where a general power of appointment over a fund is executed by will, the executors of the will are the proper persons to administer and give a discharge for the fund. *In re Philbrick's Trusts*, 13 W. R. 570; 34 L. J. Ch. 368; *Hayes v. Oatley*, 14 Eq. 1; *In re Hoskin's Trusts*, 5 Ch. D. 229; 6 ib. 281.

In the case of a special power over a fund vested in trustees the testator cannot, without special authority, appoint new trustees of the fund by his will. The fund should, therefore, be administered by the original trustees. *Busk v. Aldam*, 19 Eq. 16.

A charge upon particular lands in favour of certain persons expressed by the testator to be made by virtue of a particular power and of all other powers enabling him, will operate by way of devise upon such interest as the testator has if the power is no longer subsisting at his death. *Sing v. Leslie*, 2 H. & M. 68.

Real estate  
subject to  
a power.

Adminis-  
tration of  
appointed  
fund.

An ap-  
pointment  
may take  
effect by  
way of  
devise.

## CHAPTER XX.

## RESIDUARY BEQUESTS.

## I. WHAT IS A RESIDUARY GIFT.

No particular words necessary to pass the residue.

SUCH words as goods, chattels, or effects will, as a rule, pass the residuary personalty; no particular words are, however, necessary for that purpose. *Bland v. Lamb*, 2 J. & W. 399; *Hearne v. Wigginton*, 6 Mad. 120; *Fleming v. Burrows*, 1 Russ. 276; *Leighton v. Baillie*, 3 M. & K. 267; *In re Bassett's Estate*; *Perkins v. Fladgate*, 14 Eq. 54.

Doctrine of *ejusdem generis*.

The question frequently arises whether words in themselves large enough to pass the residue, but coupled with an enumeration of particular things, will be cut down to pass only things *ejusdem generis* with those enumerated.

Enumeration of particulars followed by *et cætera*.

With regard to the meaning of *et cætera* following an enumeration of specific things, no precise rule can be laid down. The tendency of the most recent cases is to give the word the widest possible meaning, so that it would pass even real estate. *Chapman v. Chapman*, 4 Ch. D. 800; *Mullally v. Walsh*, 3 L. R. Ir. 244.

On the other hand, in some of the earlier cases *et cætera* following an enumeration of particulars has been confined to things *ejusdem generis*. *Marquis of Hertford v. Louther*, 7 B. 1; *Newman v. Newman*, 26 B. 220; *Barnaby v. Tassell*, 11 Eq. 363.

Large

Where there are comprehensive words followed by an

enumeration of particulars, an *et cætera* will not restrict the meaning of the large words. *Kendall v. Kendall*, 4 Russ. 360; *Gover v. Davis*, 29 B. 222.

words followed by an enumeration of particulars.

Large words, such as goods, chattels or effects, when they are followed by an enumeration of particulars, will not be limited to things *ejusdem generis*. *Fisher v. Hepburn*, 14 B. 627; *Patterson v. Huddart*, 17 B. 210; *Ellis v. Selby*, 7 Sim. 352; 1 M. & Cr. 286; *Swinfen v. Swinfen*, 29 B. 207; *Avison v. Simpson*, Jo. 43.

The same is the case though the particulars are introduced by words intended to be explanatory of the former words, for instance, "namely," "consisting in," "together with," "such as," "both in," or similar words. *Bridges v. Bridges*, 8 Vin. Abr. Devise, 295, pl. 13; *Gover v. Davis*, 29 B. 222. *In bonis Goodyar*, 1 Sw. & Tr. 127; 4 Jur. N. S. 1243; *Mahoney v. Donovan*, 14 Ir. Ch. 262, 388; *Drake v. Martin*, 23 B. 89; *Dean v. Gibson*, 3 Eq. 713; *Maberley's Trusts*, 19 W. R. 522; *King v. George*, 4 Ch. D. 435; 5 *ib.* 627; *In re Fleetwood*; *Sidgreaves v. Brewer*, 15 Ch. D. 594; *Mullally v. Walsh*, 3 L. R. Ir. 244; see *Kendall's Trust*, 14 B. 608. *Timewell v. Perkins*, 2 Atk. 103, is not to be followed.

Explanatory words.

And the words "whether in money or in the public funds or other securities of any sort or kind whatsoever," have an enlarging rather than a restrictive force, so far as personal property is concerned. *Cambridge v. Rous*, 8 Ves. 14; see *Reeves v. Baker*, 18 B. 372.

On the other hand, a gift of all the testator's property in certain securities is a gift of those securities only. *Enohin v. Wylie*, 1 D. F. & J. 410; 10 H. L. 1.

Property in certain securities.

But such a gift may be enlarged to a residuary gift, if the testator goes on to state, that it is his intention to dispose of all his property among the legatees in question. *Patrick v. Yeatherd*, 12 W. R. 304.

It seems that the express inclusion in the large words of

Express inclusion of

things which would have passed without mention.

some particular property, which would have passed without being expressly included, affords an argument for excluding from the gift things *ejusdem generis* with that included. *Steignes v. Steignes*, Mos. 296.

Enumeration of particulars preceding large words will not restrict the latter.

General words following an enumeration of particulars will *prima facie* have their full force whether introduced by the word "other" or not, if a restricted construction would cause an intestacy. *Arnold v. Arnold*, 2 M. & K. 365; *Swinfen v. Swinfen*, 29 B. 207; *Campbell v. Prescott*, 15 Ves. 503; *Michell v. Michell*, 5 Mad. 69; *Martin v. Glover*, 1 Coll. 269; *Parker v. Marchant*, 1 Y. & C. C. 290; *Nugee v. Chapman*, 29 B. 290; *Hodgson v. Jex*, 2 Ch. D. 122; see, too, *Re Lloyd's Estate*, 2 Jur. N. S. 539; *Everall v. Browne*, 1 Sm. & G. 368.

The fact that specific and general legacies are given in later parts of the will is not sufficient to restrict the general words. *In bonis Shephard*, 48 L. J. P. 62.

It is immaterial that certain things which would have passed under the previous words, if read in their large sense, are subsequently given to the same legatee. *Bennett v. Batchelor*, 1 Ves. jun. 63; 3 B. C. C. 27; *Fleming v. Burrows*, 1 Russ. 276.

It makes no difference, that the gift is not strictly residuary, so that there might possibly be property which it would be ineffectual to pass. *Hodgson v. Jex*, 2 Ch. D. 122.

The word article, however, has not the same large sense as goods or effects. *Collier v. Squire*, 3 Russ. 467.

Large words confined to things *ejusdem generis*,

But if it is clear that the gift was not meant to be residuary, and the large words, if not confined to things *ejusdem generis*, would carry the residue, they must be so confined.

if there is another residuary gift,

1. This is the case, if there is an express residuary gift. *Woolcomb v. Woolcomb*, 3 P. W. 112; *Stuart v. Marquis of Bute*, 1 Dow. 84; *Lamphier v. Despard*, 2 Dr. & War.



59; *Mullins v. Smith*, 1 Dr. & Sm. 204; *Campbell v. McGrain*, 1 R. 9 Eq. 397; *Waite v. Morland*, 13 W. R. 963; *Smith v. Davis*, 14 W. R. 942.

2. So when the residue has been given and the will is then revoked so far as relates to the bequest to the residuary legatee of the testatrix's plate, linen, household goods, and other effects, these words would be confined to things *ejusdem generis*. *Hotham v. Sutton*, 15 Ves. 319.

or it is clear that the gift in question was not meant to be residuary.

If, however, the revocation is of the same enumerated things and "other effects (except money)," the testatrix shows that she considered things not *ejusdem generis* would be included, and the large words will have their full force. *Hotham v. Sutton*, 15 Ves. 326; *Ivison v. Gassiot*, 3 D. M. & G. 958; see *Steignes v. Steignes*, Mos. 296. *Fleming v. Brook*, 1 Sch. & Lef. 318, is inconsistent with *Hotham v. Sutton*.

So, too, if something stated to be a portion of certain specific property, together with the testator's household furniture and effects of what nature or kind soever, is given to a legatee, and the testator then makes other gifts, the earlier gifts being clearly not residuary will only pass things *ejusdem generis* with those enumerated. *Rawlings v. Jennings*, 13 Ves. 39.

And it would seem that where there is a gift of certain articles and all other goods of whatever kind to a legatee at the commencement of a will, followed by dispositions of other portions of the testator's property, and the remainder of the latter property is given to the same legatee, it is clear that the first gift was not meant to be residuary. *Wrench v. Jutting*, 3 B. 521.

So, too, a gift of the remainder of the testator's money and effects to be expended in purchasing a suitable present for his godson must be read as limited to things *ejusdem generis* with money. *Borton v. Dunbar*, 1 Giff. 221; 2 D. F. & J. 338; 30 L. J. Ch. 8.

3. Or, again, the testator may show by subsequent reference or explanation that he meant only things *ejusdem generis* to pass. *Sutton v. Sharp*, 1 Russ. 149; see *A.-G. v. Wiltshire*, 16 Sim. 38.

Bequest of  
things in a  
house.

In the case of a bequest of things in a house where the house is also given to the legatee, general words following an enumeration of particulars will more readily be limited so as to pass only things *ejusdem generis*.

The mention of one particular class of things, coupled with general words, will not cut down the general words.

Thus under a bequest of furniture and other movable goods in a house, money will pass. *Swinfen v. Swinfen*, 29 B. 207; *Mahony v. Donovan*, 14 Ir. Ch. 262, 388; *Cole v. Fitzgerald*, 3 Russ. 301.

On the other hand, if there is a long enumeration of particulars, such as furniture, plate, linen, and the like, followed by general words, the general words will be confined to things *ejusdem generis*; so that, for instance, money in the house would not pass. *Trafford v. Berrige*, 1 Eq. Ab. 201, pl. 4; *Boon v. Cornforth*, 2 Ves. sen. 278; *Campbell v. M'Grain*, 1 R. 9 Eq. 397; *Watson v. Arundel*, 1 R. 10 Eq. 299; see *Dutton v. Hockenhull*, 22 W. R. 701.

The argument in favour of a restricted construction of the general words is strengthened, if there is anything to show that the testator intended the chattels in question to be enjoyed with the house. *Gibbs v. Lawrence*, 7 Jur. N. S. 137; 30 L. J. Ch. 171; *Bradish v. Ellames*, 13 W. R. 128; 10 Jur. N. S. 1170, 1231.

The same is the case, if the things given are annexed to the house as heirlooms, a term implying durability. *Hare v. Pryce*, 12 W. R. 1072; *Fitzgerald v. Field*, 1 Russ. 427.

And in a similar gift the fact that a pecuniary legacy is given to the same legatee will prevent money in the house from passing as goods and chattels. *Roberts v. Kuffin*, 2 Atk. 113; *Anon.* Prec. Ch. 8. See, too, *ante*, pp. 150, 151.

## II. WHAT PASSES UNDER A RESIDUARY GIFT.

Gifts of residue may be either gifts of the residue of a particular fund or they may be general residuary gifts. Gifts of the residue of a particular fund may be either gifts of the residue of a fund over which the testator has a power of appointment, or of a fund created by the testator for the purposes of his will.

## 1. As to the residue of an appointed fund :

A gift of the residue of a fund over which the testator has a power of appointment, if not specific (see *ante*, pp. 112, 113), passes shares in the fund the gift of which lapses or fails. *Falkner v. Butler*, Amb. 514; *Oke v. Heath*, 1 Ves. sen. 134.

This is the case, though the share in question may be directed to fall into the residue in certain events, which do not happen. *In re Meredith's Trusts*, 3 Ch. D. 757.

It appears to be immaterial that the residue is given only after deducting or after payment of the sums already appointed. *Falkner v. Butler*, Amb. 514; *Carter v. Taggart*, 16 Sim. 423; *In re Harries' Trust*, Joh. 199.

If it can be shown, that by the word residue the testator means no more than the precise sum which remains after the other gifts are provided for, the gift of the residue is in effect the gift of a specific sum, and will not carry lapsed shares. *In re Jeaffreson's Trusts*, 2 Eq. 276.

The case of *Easum v. Appleford*, 10 Sim. 274; 5 M. & Cr. 56, if it can be supported at all, must be supported on these grounds. See, too, *Lakin v. Lakin*, 13 W. R. 704.

## 2. As to the residue of a particular portion of the testator's own property :

Where a testator disposes of part of his lands in a particular parish to A. and devises the residue of those lands to B., the devise to B. is specific, and will not carry a lapsed

share. *In re Brown's Trusts*, 1 K. & J. 522; *Springett v. Jennings*, 6 Ch. 533.

Residue of  
fund of  
personalty.

In the case of personalty, where the testator cannot be supposed to have in his mind the distinct portions of which the property is composed, different rules apply. Thus, if he disposes of a particular portion of his personalty, and then gives the residue of that portion, whether it is described as residue not otherwise disposed of or after payment of the sums previously given, the particular residue passes shares in the property which lapse or are invalidly given. *De Trafford v. Tempest*, 21 B. 564; *Aston v. Wood*, 43 L. J. Ch. 715; *Champney v. Davy*, 11 Ch. D. 949.

A gift of particular residue "not specifically bequeathed" will not carry lapsed portions of the property, if there is a general residuary bequest, though the latter may be given with precisely the same words. *Patching v. Barnett*, 28 W. R. 886, 890.

General re-  
sidue and  
residue of  
a particu-  
lar fund.

Upon the question whether a gift of a residue is a gift of the general residue or only of the residue of a particular fund, see *Ommaney v. Butcher*, T. & R. 260; *Legge v. Asgill*, *ib.* 265 n.; *Wrench v. Jutting*, 3 B. 521; *Boys v. Morgan*, 9 Sim. 289; 3 M. & Cr. 661; *Markham v. Ivatt*, 20 B. 579; *Jull v. Jacobs*, 3 Ch. D. 703.

### 3. As to a general residue :

General  
residuary  
gift.

A general residuary gift passes everything not disposed of, whether the testator has not attempted to dispose of it, or whether the disposition fails by lapse or any other event. *Bernard v. Minshull*, Johns. 276.

It also passes property attempted to be appointed. *Spooner's Trust*, 2 Sim. N. S. 129.

And a gift of general residue "not otherwise disposed of," or "not herein specifically bequeathed," will pass property not effectually disposed of. *Green v. Dunn*, 20 B. 6; *De Trafford v. Tempest*, 21 B. 564; *Patching v. Barnett*, 28 W. R. 886, 890.

A residuary gift has even been held to include property directed to be considered as part of the testator's personal estate, and to go in a due course of administration. *Scott v. Moore*, 14 Sim. 35.

Under a residuary devise, from which the testatrix excepted the lands subject to the uses of her marriage settlement, under which she took an ultimate remainder in fee, it was held that the remainder in fee in lands conveyed to the uses of the settlement subsequently to the date of the will passed. *Hughes v. Jones*, 11 W. R. 898; see *Torrens v. Millington*, 26 W. R. 753.

But the testator may show an intention not to include certain property in the residue by reciting, for instance, that it is settled in a particular manner, though it may not be so settled. *Circuitt v. Perry*, 23 B. 275; *Harris v. Harris*, I. R. 3 Eq. 610; *Hawkes v. Longridge*, 29 L. T. N. S. 449.

Again, the terms in which the residue is given may exclude certain property from it.

Thus, if the testator declares his intention of disposing of certain property by codicil, a gift of residue "not reserved to be disposed of by codicil" does not pass the reserved property if no disposition is made of it. *Davers v. Dewes*, 3 P. W. 40.

So, too, though a "small" balance would include any balance that may happen to remain after making the payments directed by the testator, a bequest of the "small remainder" will not include interests that lapse. *Page v. Young*, 19 Eq. 501; *A.-G. v. Johnstone*, Amb. 576; see *Blund v. Lamb*, 2 J. & W. 399.

Where property is excepted from a residue, and the only object of the exception is to make a particular bequest, which fails, the excepted property falls into the residue. *Evans v. Jones*, 2 Coll. 516; *Wingfield v. Newton*, cit. 2 Coll. 520; *Thompson v. Whitelock*, 7 W. R. 625; 4 De G.

Intention  
to exclude  
certain prop-  
erty from  
the resi-  
due.

Residue  
limited by  
restrictive  
words.

"Small re-  
mainder."

Property  
excepted  
from  
residue.

& J. 490; see *Tatham v. Vernon*, 29 B. 604; *Torrens v. Millington*, 26 W. R. 753.

Similarly, if the exception can be read as intended only to exclude the property from a trust for sale to which the residue is subject, the property excepted passes to the residuary legatees. *James v. Irving*, 10 B. 276; *Dobson v. Banks*, 32 B. 259.

On the other hand, if the residue is given charged with debts, and certain property is exonerated from the charge and excepted from the residue, it will not pass with the residue on failure of the particular bequest. *Wainman v. Field*, Kay, 507.

Residue of  
residue.

Where the residue itself is distributed in certain shares, and a legacy is given out of one of the shares, followed by a disposition of the residue of such share, the legacy is undisposed of, if the legatee predeceases the testator. *Skrymsher v. Northcote*, 1 Sw. 566; *Lloyd v. Lloyd*, 4 B. 231.

So, where the residue is given as to one-fourth on trusts which fail, a gift of the residue of that residue will not carry the lapsed fourth. *Simmons v. Rudall*, 1 Sim. N. S. 115.

A bequest of residue beyond a sum of £10,000, directed to be set apart out of the residue, will not carry lapsed portions of the £10,000. *Green v. Pertwee*, 5 H. 249.

Revoca-  
tion of  
share of  
residue.

Where the residue is given between several persons nominatim as tenants in common, and the gift to one of them is revoked, the gift of that share lapses, whether the revocation be of the share or of the trusts of the will, so far as they relate to the share. *Cresswell v. Cheslyn*, 2 Ed. 123; *Ramsay v. Shelmerdine*, L. R. 1 Eq. 129; *Sykes v. Sykes*, 4 Eq. 200; 3 Ch. 301.

If a share is expressed to be revoked with a view to put the other residuary legatees on an equality with the one whose share is revoked, the revoked share passes to the others. *Vaudrey v. Howard*, 2 W. R. 32.

Where the residue is completely disposed of, and by a subsequent clause the testator directs that another person is to take a share, the effect of a revocation of the latter gift is to leave the earlier gift of the whole residue effectual.

*Harris v. Davis*, 1 Coll. 416.

A direction that a share of residue, the trusts of which fail or which is undisposed of, should fall into residue and be disposed of, or be held and applied, or be paid and divided accordingly, has in several cases been held insufficient to carry the share to the other residuary legatees or to prevent a lapse of any part of the share. *Humble v. Shore*, 7 H. 247; 1 H. & M. 550; *Lightfoot v. Burstall*, 1 H. & M. 546; *Re Bevis's Trusts*, 20 W. R. 359; *In re Barker's Estate*; *Hetherington v. Longrigg*, 15 Ch. D. 635; *In re Savage's Trusts*, 50 L. J. Ch. 131.

Direction that share of residue shall fall into residue.

In a recent case, however, upon words which it would be very difficult to distinguish from those used in the cases above cited, it was held that a share directed to fall into residue and be paid according to the trusts of the will, passed to the other residuary legatees. *Crawshaw v. Crawshaw*, 14 Ch. D. 817.

It would seem that a share of residue, directed in certain events to sink into residue and be paid accordingly, might very well be divided in the same way as the residue. For instance, if the residue is given in thirds, the lapsed third would itself be divisible in thirds; and if the process could be continued *ad infinitum* the other residuary legatees would, in effect, take the whole. See *Evans v. Field*, 8 L. J. Ch. 264; *Atkinson v. Jones*, Joh. 246.

Where one of the residuary legatees dies and the testator, by codicil, confirms the will, except as to any legacy lapsed, it has been held that the share of the deceased legatee is undisposed of. *Re Mary Wood's Will*, 29 B. 236.

## CHAPTER XXI.

## CONVERSION.

## I. WHAT AMOUNTS TO A DIRECTION TO CONVERT.

**What amounts to a direction to convert.** PROPERTY directed to be converted is considered as that species of property into which it is to be converted, and passes to a legatee or devisee as if the conversion had actually taken place.

**Direction that land is to be considered money or land.** A direction that land is to be considered as money or *vice versa* will not work a conversion, but an actual change of one form of property into another must be intended. *Johnson v. Arnold*, 1 Ves. sen. 171; *A.-G. v. Mangles*, 5 M. & W. 120; *Edwards v. Tuck*, 23 B. 268; 3 D. M. & G. 40.

**Direction to divide.** A direction to divide does not imply a conversion. *Cornick v. Pearce*, 7 Ha. 477; *Lucas v. Brandreth*, 28 B. 273.

But a direction to get together and divide among a large number of legatees property consisting of realty and personalty and previously described as scattered about and not realised, coupled with a direction to invest some of the shares, is in effect a direction to convert. *Mower v. Orr*, 7 Ha. 475.

**Power to convert.** A mere power to convert will not effect a conversion. *Greenway v. Greenway*, 2 D. F. & J. 128.

Though if legacies payable in the ordinary course are to be paid after the conversion, the power is in effect a trust. *Burrell v. Baskerfield*, 11 B. 525.



Where a conversion is directed, the fact that the trustees have a discretion as to time will not alter the general rule.

*Doughty v. Bull*, 2 P. W. 320.

When conversion is to take place upon request the question is whether the conversion was intended to be made in all events, and the request is only an additional safeguard, or whether no conversion was intended till request.

Conversion upon request.

If the conversion is to be upon request of certain persons, and the property is disposed of, whether converted or not, there is no conversion till the request. *Taylor's Settlement*, 9 Ha. 596; *Davies v. Goodhew*, 6 Sim. 585.

On the other hand, if there is a general intention to convert evidenced by the fact that the limitations are applicable only to the property as converted, and by the fact that the conversion is to be at the request of certain persons, or the survivor or the executors or administrators of the survivor, the property will be considered as converted. *Thornton v. Hawley*, 10 Ves. 129; see *Lechmere v. Earl of Carlisle*, 3 P. Wms. 211.

Where there is an express trust to convert, a power to continue any government stocks and real securities will be confined to such as are of a permanent character. *Tickner v. Old*, 18 Eq. 422.

Power to continue government securities where there is a trust to convert.

But where the trust was to convert such parts as should not be invested in the public funds or government securities, long annuities were held within the exception, and enjoyable in specie. *Wilday v. Sandys*, 7 Eq. 455.

Where trustees have an absolute discretion to convert or not, the property remains unconverted till the discretion is exercised. *Polley v. Seymour*, 2 Y. & C. Ex. 708; *Yates v. Yates*, 6 Jur. N. S. 1023; *Brown v. Bigg*, 7 Ves. 279; *Bourne v. Bourne*, 2 Ha. 35.

Absolute discretion to trustees.

Similarly, where trustees have an option to convert either into realty or personalty, the property will be considered of

that species into which the trustees convert it. *Van v. Barnett*, 19 Ves. 102; *Walker v. Denne*, 2 Ves. jun. 170; *Rich v. Whitfield*, L. R. 2 Eq. 583.

Discretion  
may be  
controlled  
by the  
context.

The option of the trustees may, however, be controlled by the general intention expressed in the will. Thus, if the property to be converted is settled to uses exclusively applicable to realty; as, for instance, in tail with remainders, the property will be considered as realty notwithstanding the option. *Earlom v. Saunders*, Amb. 241; *Hereford v. Ravenhill*, 5 B. 51; *Evans v. Ball*, 38 L. T. N. S. 141; see *Minors v. Battison*, 1 App. C. 428.

And in such a case an ultimate limitation to the testator's right heirs, executors, and administrators will not prevent the property being considered as land with respect to the prior interests. *Cowley v. Harstonge*, 1 Dow. 361.

The fact that personalty which trustees have an option to convert is given to a person, his heirs and assigns, is not sufficient to limit the option of the trustees. - *Atwell v. Atwell*, 13 Eq. 23.

But if it is given to a person and his heirs for ever, the property will apparently be considered converted notwithstanding the option of the trustees. *Cookson v. Reay*, 5 B. 22; see 12 Cl. & F. 121.

## II. WHETHER CONVERSION IS DIRECTED FOR ALL THE PURPOSES OF THE WILL

Direction  
that con-  
verted  
realty  
should  
form part  
of the  
personal  
estate.

1. Where realty is directed to be converted and form part of the personal estate, it will be subject to all the limitations of the personal estate, and will pass by the residuary bequest. *Kidney v. Coussmaker*, 1 Ves. jun. 436; *Robinson v. Governors of London Hospital*, 10 Ha. 19, 27; see *Bright v. Larcher*, 3 De G. & J. 148; *Field v. Peckett*, 29 B. 568; *quære*, whether *Collier v. Wakeman*, 2 Ves. jun. 683, would be followed.

But notwithstanding a direction that moneys to arise from a sale of realty are to be considered as part of the personal estate, they will not pass under a gift of the residuary personalty, if the residuary gift is followed by a gift of the moneys arising from the sale. *Amphlett v. Parke*, 4 Russ. 75; 2 R. & M. 221.

2. It seems clear that under the old law a gift of the residue of the proceeds of sale of realty fell under the same rule as an ordinary residuary devise, and did not carry legacies given out of the proceeds, which failed through lapse or otherwise. *Jones v. Mitchell*, 1 S. & St. 290; *Hutcheson v. Hammond*, 3 B. C. C. 128.

Gift of the residue of the proceeds of sale of realty under the old law.

3. Upon the question whether conversion is directed for all the purposes of the will, so that interests in the proceeds of sale of realty which are undisposed of or fail by reason of lapse or otherwise, are intended to pass by a general bequest of residuary personalty, the cases run into fine, though, perhaps, not irreconcilable distinctions.

Whether converted realty passes by a residuary bequest.

a. When conversion is directed at the death of a tenant for life, and the proceeds are to be divided among a class of persons who at that time may not be in existence, or may never come into existence; for instance, such of the children of the tenant for life as attain twenty-one, conversion is not merely for the purpose of division, but for all the purposes of the will, and the property passes to the residuary legatee as personalty. *Wall v. Colshead*, 2 De G. & J. 683.

Direction to convert at a certain time and divide among persons who may not then be in existence.

b. Where there is an absolute direction to sell realty not limited to any particular purpose, the surplus proceeds will pass to the residuary legatee. *Singleton v. Tomlinson*, 3 App. C. 404, affirming S. C. nom. *Watson v. Arundell*, 1 R. 11 Eq. 53.

Absolute direction to sell.

c. If the realty is to be sold for a particular purpose, for instance, to pay legacies, the surplus proceeds will not pass

Sale for certain purposes.

under a gift of residuary personalty. *Maugham v. Mason*, 1 V. & B. 410.

Gift of a mixed fund to be converted.

d. Where realty and personalty are once for all blended together, and directed to be converted, interests undisposed of will pass to the residuary legatee. *Durour v. Motteux*, 1 Ves. sen. 320; 1 S. & St. 292 n.; *Byam v. Munton*, 1 R. & M. 503; *Green v. Jackson*, 5 Russ. 35; 2 R. & M. 238; *Salt v. Chattaway*, 3 B. 576; *Spencer v. Wilson*, 16 Eq 501; *Court v. Buckland*, 45 L. J. Ch. 214; *Norreys v. Franks*, 1 R. 9 Eq. 18. *Cruse v. Barley*, 3 P. Wms. 20, may probably be accounted for on the principle that the gift of residue there was not of a real residue, but of the residue of a real residue. The residue had in effect already been given among the testator's children, and the subsequent words only indicated what shares in that residue each was to take, and upon lapse of one of those shares a portion of the residue was thereby undisposed of.

Realty directed to be converted the subject of a separate gift.

e. But when the realty directed to be converted and the personalty are the subject of separate gifts, and are treated as distinct funds, the residuary bequest will not carry interests undisposed of in the realty. *Maugham v. Mason*, 1 V. & B. 410; *Hutcheson v. Hammond*, 3 B. C. C. 128.

Realty and personalty blended but treated as distinct funds.

f. Intermediate between the last two classes of cases falls a class of cases where the real and personal estate are blended together, but the two funds are treated as distinct and independent, in which case the interests in the realty undisposed of will not pass to the residuary legatee.

Thus, though realty and personalty are blended together and directed to be converted, if the proceeds of the sale of the realty are treated as a separate fund for certain payments, interests undisposed of will not pass under the gift of the residuary personalty. *Dixon v. Dawson*, 2 S. & St. 327.

So, too, if there is a gift as well of the residue of the moneys to arise from the sale as of the residue of the

personal estate, the latter residue will not carry legacies given out of the proceeds of sale which lapse. *Gravenor v. Hallum*, Ambl. 643; *Gibbs v. Rumsey*, 2 V. & B. 294.

But the fact that the residue of the money to arise from the sale of realty is expressly given will not prevent such money from passing under the residuary personalty, if the residue of the money is only mentioned as part of the enumeration of the things of which the residuary personalty consists. *Kennell v. Abbott*, 4 Ves. 802.

### III. CONVERSION IS LIMITED TO THE PURPOSES OF THE WILL.

Conversion directed by a testator is a conversion only for the purposes of the will, and all that is not wanted for these purposes goes to the persons who would have been entitled but for the will. Therefore, where real and personal estate is directed to be sold, and after payment of debts and legacies the residue is given to persons, some of whom die before the testator, the lapsed shares go proportionally to the heir-at-law and next of kin. *Ackroyd v. Smithson*, 1 B. C. C. 503.

Who is entitled to property directed to be converted but undisposed of by the will.

A declaration that the proceeds of the sale of realty are to be part of the personal estate for all purposes will not deprive the heir of such proportion of the proceeds of realty as is undisposed of, there being no express gift to the next of kin. *Shallcross v. Wright*, 12 B. 505; *Taylor v. Taylor*, 3 D. M. & G. 190, overruling *Phillips v. Phillips*, 1 M. & K. 649.

Declaration that proceeds of sale of realty are to be personal estate.

Nor will a declaration, that the proceeds of the sale shall not lapse for the benefit of the heir, exclude the heir, if a disposition is intended to be made of the property. *Flint v. Warren*, 16 Sim. 134; *Fitch v. Weber*, 6 Ha. 145.

But if the surplus of the sale of real estate is directed to be personal estate, and given to the executors, they

take in trust for the next of kin. *Countess of Bristol v. Hungerford*, 2 Vern. 645, corrected 3 P. Wms. 194.

Money to  
be invested  
in land.

The same rule applies to the case of money to be invested in land, which, upon failure of the particular dispositions, or any of them, results so far for the next of kin. *Cogan v. Stevens*, 5 L. J. Ch. 17; 1 B. 482, n.; *Hereford v. Ravenhill*, 1 B. 481; 5 B. 51; *Head v. Godlee*, Johns. 536; *Bective v. Hodgson*, 10 H. L. 656.

#### IV. HOW THE HEIR AND NEXT OF KIN TAKE PROPERTY DIRECTED TO BE CONVERTED.

Where the  
purpose of  
the con-  
version  
wholly  
fails.

1. Where a conversion of realty is directed and the objects of the conversion wholly fail, the heir takes the property as realty, whether a sale has taken place or not. *Chitty v. Parker*, 2 Ves. jun. 271; but *quære* whether the question arose in this case. *Davenport v. Coltman*, 12 Sim. 610.

Where it  
fails par-  
tially.

2. But where some purpose of the will can be answered by a sale, where, for instance, there is a tenant for life or one of several tenants in common who survives the testator, the heir takes the property as personalty. *Wright v. Wright*, 16 Ves. 188; *Smith v. Claxton*, 4 Mad. 484; *Wilson v. Coles*, 28 B. 215; *Hamilton v. Foote*, I. R. 6 Eq. 572.

Upon this principle, where a sum is directed to be raised out of devised lands and is given for life with remainders, and the remainders fail, upon the death of the tenant for life the sum charged belongs to the devisee of the land as personalty. *In re Newberry's Trusts*, 5 Ch. D. 746.

It would seem that where realty, directed to be converted, is only an auxiliary fund for payment of debts, and the personalty is sufficient to satisfy them, such realty will, on failure of all the other purposes, go to the heir as land. *Chitty v. Parker*, 2 Ves. jun. 271. (?)

But where realty and personalty are given together to be converted and charged with debts, so that the realty is applicable *pro rata*, the heir takes the realty as money on failure of all the other purposes of the conversion. *A.-G. v. Lomas*, L. R. 9 Ex. 29.

It has been said that the testator's death is the time at which it must be ascertained whether the purposes for which conversion is directed have failed or not, and therefore if at that time those purposes may possibly take effect, the heir takes as money, though they may subsequently fail. *Carr v. Collins*, 7 Jur. 165. The exact point, however, was not there decided, since, in that case, conversion was effectual with respect to the legacy of £1000.

3. In the same way personalty laid out in land in pursuance of a direction in the will, but only partially disposed of, will go to the next of kin as land. *Curteis v. Wormald*, 10 Ch. D. 172, overruling *Reynolds v. Godlee*, Johns. 536, 582.

#### V. CONVERSION AS BETWEEN TENANT FOR LIFE AND REMAINDERMAN.

When there is no express trust to convert, but a residue of personalty is given *en masse* to several persons successively, wasting property must be converted, unless it appears from the will that specific enjoyment by the tenant for life was intended. *Howe v. Lord Dartmouth*, 7 Ves. 137; *Johnson v. Johnson*, 2 Coll. 441; *Thornton v. Ellis*, 15 B. 193; *Macdonald v. Irvine*, 8 Ch. D. 101.

And in the same way the tenant for life is entitled to have reversionary property converted, though the reversion is dependent upon his own life interest. *Wilkinson v. Duncan*, 23 B. 469; *Johnson v. Routh*, 3 Jur. N. S. 1041; 27 L. J. Ch. 305; *Countess of Harrington v. Atherton*, 3 D. J. & S. 352.

What will entitle the tenant for life to specific enjoyment.

Interests of the successive takers not antagonistic.

Settlement of an absolute interest.

Discretionary power to convert when trustees may think fit.

As to what is sufficient evidence of intention that the property left by the testator was to be specifically enjoyed :

Cases where the residue is given to the testator's widow for the maintenance of herself and her children, and after her death to the children, are of course less strong in favour of conversion, than when the interests of tenant for life and remainderman are conflicting. *Wearing v. Wearing*, 23 B.99; *Marshall v. Bremner*, 2 Sm. & G. 237.

So, too, where there is an absolute gift to a daughter, which is afterwards cut down by way of settlement to a life interest, there is a strong argument against conversion. *Vachell v. Roberts*, 32 B. 140.

The fact that the residuary gift includes real estate, the devise of which is specific, does not entitle the tenant for life to specific enjoyment of the residuary personalty. *Howe v. Lord Dartmouth*, 7 Ves. 137.

A discretionary power to convert, when trustees may think fit, does not entitle the tenant for life to the enjoyment of the property in specie in the meantime. *Wilkinson v. Duncan*, 23 B. 469; *Llewellyn's Trust*, 29 B. 171; *Yates v. Yates*, 28 B. 637; *Caldecott v. Caldecott*, 1 Y. & C. C. 312; *Meyer v. Simmenson*, 5 De G. & S. 723; *Brown v. Gellatly*, L. R. 2 Ch. 751; see *Simpson v. Lister*, 4 Jur. N. S. 1269.

Nor does a direction to convert from time to time for payment of debts imply that there is to be a conversion for no other purpose. *Caldecott v. Caldecott*, 1 Y. & C. C. 312, 737.

But an absolute discretion to sell "such parts and so much as should be necessary" to pay debts, affords an argument that the tenant for life is to enjoy specifically such parts as the trustees do not sell. *In re Sewell's Estate*, 11 Eq. 80; see *In re Leonard*; *Theobald v. King*, 29 W. R. 234.



And if a discretion to convert is given, "notwithstanding" the gift to the tenant for life, the tenant for life will be entitled in specie till conversion. *Burton v. Mount*, 2 De G. & Sm. 383.

The tenant for life is entitled in the meantime, if there is a direction to pay the produce of any portion not converted to him. *Johnston v. Moore*, 27 L. J. Ch. 453; *Mackie v. Mackie*, 5 Ha. 70; *Wrey v. Smith*, 14 Sim. 202; *Morley v. Mendham*, 2 Jur. N. S. 998; *Lean v. Lean*, 23 W. R. 484; *Miller v. Miller*, 13 Eq. 263.

An express power to sell realty affords no argument for the specific enjoyment of wasting securities. *Jebb v. Tugwell*, 20 B. 84.

A power to retain investments would not entitle the tenant for life to specific enjoyment. *Porter v. Baddeley*, 5 Ch. D. 542.

But a power to retain investments, or to sell and invest the proceeds on such securities as the trustees think proper, has been held sufficient to give the tenant for life specific enjoyment. *Gray v. Siggers*, 15 Ch. D. 74.

The tenant for life will be entitled to enjoy the property in specie as it existed at the death of the testator, where the gift is not merely of a residue, but there is an enumeration of certain specific things. *Lord v. Godfrey*, 4 Mad. 455; *Vaughan v. Buck*, 1 Ph. 75; *Vincent v. Newcombe*, Young, 599; *Blann v. Bell*, 2 D. M. & G. 775; *Hood v. Clapham*, 19 B. 90; *Bowden v. Bowden*, 17 Sim. 65; *Boys v. Boys*, 28 B. 436; *Pickering v. Pickering*, 4 M. & Cr. 289; *Thursby v. Thursby*, 19 Eq. 395. *Mills v. Mills*, 7 Sim. 501, is not easily reconcilable with the other authorities.

Where the gift is not of a residue simply but of specific enumerated things.

And in such a case the fact that a discretionary power to convert is given makes no difference. *Simpson v. Lister*, 4 Jur. N. S. 1269; *Bethune v. Kennedy*, 1 M. & Cr. 114; *Hubbard v. Young*, 10 B. 203; *Thursby v. Thursby*, *supra*.

The argument, however, in favour of specific enjoyment of things expressly enumerated is less strong where the gift is through the medium of a trust. *Craig v. Wheeler*, 29 L. J. Ch. 374; 8 W. R. 172.

On the other hand, notwithstanding a partial enumeration of specific things, the gift may in effect be merely residuary. *Sutherland v. Cooke*, 1 Coll. 894, where the gift was of "all my money in the Long Annuities, and in all or any other of the public stocks or funds, ready money and securities for money, outstanding debts, and all the rest, residue, and remainder of my estate and effects, whatsoever and wheresoever, and of what nature or kind soever the same shall or may consist at the time of my decease, not hereinbefore specifically disposed of," to trustees, who were directed by sale thereof, or of so much as should be necessary to pay debts, &c.

When the gift is of residue simply there may be an intention to give specific enjoyment.

Again, though the gift may be of a pure residue, the testator may show that he contemplates specific enjoyment.

In a will before the Wills Act, if the tenant for life is to take the rents, issues, and profits, he will be entitled to the specific enjoyment of leaseholds, if there are no freeholds to which the term rents may apply. *Goodenough v. Tremamondo*, 2 B. 513; *Cafe v. Bent*, 5 Ha. 24.

Use of the words rents and profits.

But in wills since the Wills Act the word rents, by itself, will not have this effect where it is used with other words, none of which have the same specific force. *Pickup v. Atkinson*, 4 Ha. 624; see, too, *Booth v. Coulton*, 7 Jur. N. S. 207.

Gift over of the property in specie at death of the tenant for life.

If the property is specifically given over at the death of the tenant for life, he is entitled to enjoyment in specie. *House v. Way*, 12 Jur. 958; 18 L. J. Ch. 22; *Harris v. Poyner*, 1 Dr. 174; *Collins v. Collins*, 2 M. & K. 703; *Daglie v. Fryer*, 12 Sim. 1.

A gift of a specific part of the residue at the death of the tenant for life will entitle the tenant for life to the specific enjoyment of that part. *Holgate v. Jennings*, 24 B. 623; *Macdonald v. Irvine*, 8 Ch. D. 101.

But this is not the case if the gift at the death of the tenant for life is a mere general gift, though it may be of something which forms part of the residue at the testator's death. *Lichfield v. Baker*, 2 B. 481; 13 B. 447.

An express trust to convert at the death of the tenant for life entitles the tenant for life to specific enjoyment. *Alcock v. Slopers*, 2 M. & K. 699; *Harvey v. Harvey*, 5 B. 134; *Daniel v. Warren*, 2 Y. & C. C. 290; *Rowe v. Rowe*, 29 B. 276. Express trust to convert at the death of the tenant for life.

And where the conversion of a portion is expressly postponed for a certain time, the tenant for life is entitled to specific enjoyment in the meantime. *Green v. Britten*, 1 D. J. & S. 649.

Similarly the tenant for life is entitled where there is a power to sell with his consent, or to renew leaseholds. *Hinves v. Hinves*, 3 Ha. 611; *Hind v. Selby*, 22 B. 373; *Skirving v. Williams*, 24 B. 275; *Crowe v. Crisford*, 17 B. 507. Power to sell with consent of the tenant for life or to renew leaseholds.

Where the tenant for life is entitled to the enjoyment in specie of the property of the testator as existing at his death, the debts must nevertheless be got in. *Holgate v. Jennings*, 24 B. 623. Debts must be got in.

## VI. CONVERSION BY EVENTS EXTRANEOUS TO THE WILL.

Where there is a devise of lands, whether by words of specific or general description, and the testator afterwards sells the lands, the purchase-money falls into the personal residue. And an option to purchase, given by the testator after the date of his will and exercised after Effect upon the will of a contract for sale.

his death, has the same effect. *Weeding v. Weeding*, 1 J. & H. 424.

And where the option to purchase is given before the date of the will, the effect is the same. *Lawes v. Bennett*, 1 Cox, 167; *Townley v. Bedwell*, 14 Ves. 591; *Goold v. Teague*, 7 W. R. 84; 5 Jur. N. S. 116; *Collingwood v. Row*, 26 L. J. Ch. 649; see *Edwards v. West*, 26 W. R. 507.

*Drant v. Vause*, 1 Y. & C. C. 580; *Emuss v. Smith*, 2 De G. & Sm. 722, are not easily reconcilable with the other authorities. See Dart. V. & P. 263, and *Cooper v. Martin*, L. R. 3 Ch. 47.

It makes no difference that the purchase-money is payable to the testator, his heirs, or assigns. *Townley v. Bedwell*, *supra*; *Weeding v. Weeding*, *supra*.

The case would be different, if the purchase-money is made payable to the owner of the land. *In re Graves' Minors*, 15 Ir. Ch. 357.

The principle of the cases above cited would probably not be extended to a bequest of leaseholds where the lease is determinable upon notice and payment of compensation. In such a case the legatee has been held entitled to the compensation awarded *Coyne v. Coyne*, I. R. 10 Eq. 496.

Contract  
for sale  
binding at  
the testa-  
tor's death,  
though sub-  
sequently  
rescinded  
effects a  
conver-  
sion.

On the same principle, if there is a contract to purchase realty, which is binding on the testator at his death, the purchase-money is converted into realty, and the heir or devisee is entitled to it, though the vendor may retain a power of rescission which is actually exercised after the testator's death. *Whittaker v. Whittaker*, 4 Bro. C. C. 30; *Garnett v. Acton*, 28 B. 333; *Hudson v. Cook*, 13 Eq. 417.

If, however, the contract is not binding on the testator there is no conversion. *Broome v. Monck*, 10 Ves. 597.

If the heir adopts and carries into effect a parol contract

of the testator the land is converted, and he is not entitled to the purchase-money. *Frayne v. Taylor*, 12 W. R. 287; 33 L. J. Ch. 228.

If the testator has contracted with a builder for the building of a house on a piece of land devised by him, the devisee is entitled to have the contract performed out of the personal estate, whether the Court would decree specific performance of the contract or not. *Cooper v. Jarman*, 3 Eq. 98; see *Re Tann*, 7 Eq. 434.

The devisee is not entitled to interest on the purchase-money pending the completion of a contract to purchase land. *Puxley v. Puxley*, 1 N. R. 509.

Where certain property is after the date of the will converted into personalty by Act of Parliament, the property passes as personalty, though the conveyances required by the Act may not have been executed. *Cadman v. Cadman*, 13 Eq. 470; see *Frewin v. Frewin*, 10 Ch. 610.

A notice to treat under the Lands Clauses Act, followed by an agreement as to the price to be paid, converts the lands in question, though there may be no sufficient contract under the Statute of Frauds. *Ex parte Hawkins*, 13 Sim. 569; *Re Manchester and Southport Railway*, 19 B. 365; *Watts v. Watts*, 17 Eq. 217.

A mere notice to treat is not sufficient to effect a conversion, nor is a notice to treat followed by a statement on the part of the vendor of the sum he is willing to take, if he dies before it has been accepted. *Haynes v. Haynes*, 1 Dr. & Sm. 426; *Re Battersea Park Acts*; *Ex parte Arnold*, 32 B. 591; see *Coyne v. Coyne*, 1 R. 10 Eq. 496.

And an agreement, if land is taken under compulsory powers, to pay so much an acre for it, will not cause conversion. *Ex parte Walker*, 1 Dr. 508.

In cases where conversion takes place the devisee is,

under section 23 of the Wills Act, entitled to the rents between the testator's death and the completion of the purchase. *Watts v. Watts*, 17 Eq. 217.

On the same principles, where realty has been rightfully converted, whether by a trustee in bankruptcy or under a decree of the Court, it passes as personalty, and in the latter case the conversion is held to take place as from the date of the decree. *Banks v. Scott*, 5 Mad. 493; *Steed v. Preece*, 18 Eq. 192; *Arnold v. Dixon*, 19 Eq. 113.

Where more than was necessary has been sold under a decree, the surplus, it has been held, retains its former character. *Cooke v. Dealey*, 22 B. 196; *Jerny v. Preston*, 13 Sim. 356; but see *Steed v. Preece*, *supra*.

Conversion into fee simple of renewable leaseholds held in *quasi* tail.

As to the effect of the conversion of renewable leaseholds for lives and years held in *quasi* tail into a fee under statutory powers, see *Morris v. Morris*, I. R. 6 C. L. 73; *ib.* 7, p. 295; *In re Dane's Estate*, I. R. 10 Eq. 207; *Batteste v. Maunsell*, I. R. 10 Eq. 314.

## CHAPTER XXII.

GIFTS TO PERSONÆ DESIGNATÆ AND TO PERSONS  
FILLING A CERTAIN CHARACTER.

I. FOR the purpose of ascertaining the persons to take under certain names and descriptions, evidence is admissible: firstly, of all the facts known to the testator at the time of making his will; secondly, of any peculiar names or phrases which the testator was in the habit of using, whether nicknames or names erroneously applied to certain objects, provided in the latter case there are no persons to whom the names correctly apply, and for this purpose any documents or writings of the testator, including a prior will, are admissible. *Reynolds v. Whitam*, 16 L. J. Ch. 434; see *Feltham's Trusts*, 1 K. & J. 532; *Gregory's Will*, 34 B. 600.

What evidence is admissible.

Evidence is also admissible of the objects the testator was likely to benefit: evidence, for instance, to which of two societies, both insufficiently answering a certain description, the testator was in the habit of subscribing. *Kilvert's Trusts*, 12 Eq. 183; 7 Ch. 170.

If among the objects thus shown to be known to the testator there is some one who fully answers the description in the will, evidence to show that another person was meant is not admissible. *Delmare v. Robello*, 1 Ves. jun. 412; 3 B. C. C. 446; *Holmes v. Custance*, 12 Ves. 279; *In bonis Peel*, 2 P. & D. 46.

Person fully answering the description will take as persona designata.

A legatee is sufficiently described by his first Christian

name, or even by initials. *Mostyn v. Mostyn*, 5 H. L. 155; *Abbot v. Massie*, 3 Ves. 148.

But not if  
he was un-  
known to  
the tes-  
tator.

It is, on the other hand, perfectly clear that the mere fact of a person fully answering to the description in the will (the description being of a *persona designata*) will not entitle him to take under it if it appears from the admissible evidence that the testator was not aware of his existence. Therefore, under a gift to Elizabeth, daughter of Mary Beynon, or to my nephew Joseph, neither Elizabeth, an illegitimate daughter, nor a nephew called Joseph, will take if it appears that the testator was not aware of their existence. *Doe d. Thomas v. Beynon*, 12 Ad. & E. 431; *Grant v. Grant*, L. R. 5 C. P. 380, 727.

Evidence  
of nick-  
name, &c.,  
is admis-  
sible.

The testator may have habitually called certain persons or things by peculiar names by which they are not commonly known, and of this evidence is admissible; thus, where the gift was to Catherine Earnley, evidence was admitted to show whom the testator was in the habit of calling by that name. *Beaumont v. Fell*, 2 P. Wms. 141; *Masters v. Masters*, 1 P. Wms. 421; *Dowset v. Sweet*, Ambl. 175; *Lee v. Pain*, 4 Ha. 251; *Kell v. Charmer*, 23 B. 195.

But not  
evidence  
to explain  
a patent  
ambiguity.

But if the testator merely designates legatees by letters having no reference to their names, there is a patent ambiguity which may not be explained by evidence. *Clayton v. Nugent*, 13 M. & W. 200; *Sullivan v. Sullivan*, I. R. 4 Eq. 457.

Blanks  
may not be  
supplied.

Where a blank is left for the name of a legatee, no evidence of intention is admissible, and the gift is void for uncertainty. *Winn v. Littleton*, 2 Ch. Ca. 51; *Baylis v. Attorney-General*, 2 Atk. 239; *Hunt v. Hort*, 3 Bro. C. C. 311; *Taylor v. Richardson*, 2 Dr. 16.

Where, however, there is a clear gift to a certain class, and an intention is expressed of including or excluding certain persons whose names are left in blank, the clause



of inclusion or exclusion only is void for uncertainty, and the gift to the class is good. *Illingworth v. Cooke*, 9 Ha. 37; *Gill v. Bagshaw*, L. R. 2 Eq. 746.

But if the testator goes on to define the class by name, and inserts the names of persons who cannot alone be said to constitute the class, leaving blanks for other names, the gift is void for uncertainty; for instance, if the gift be to my nephews and nieces, John and Nanny, followed by a blank, John and Nanny not satisfying the description nephews and nieces. *Greig v. Martin*, 5 Jur. N. S. 329.

The fact that a blank is left for the Christian name, or for the surname, of the legatee will not avoid the legacy if there is no doubt to whom the rest of the name applies. *Price v. Page*, 4 Ves. 680; *Phillips v. Barker*, 1 Sm. & G. 582, where the gift was to ——— Davis, daughter of S. Davis, and the testator knew only of one daughter at the date of the will. *In bonis De Rosaz*, 2 P. D. 66; see *Re Gregson's Trusts*, 12 W. R. 935.

II. Where the legatee is inaccurately named or described, <sup>Inaccurate description.</sup> so that there is no one who fully answers the name or description, the Court will if possible gather from the contents of the will and the surrounding circumstances who was meant. *Ryall v. Hannam*, 10 B. 536; *Camoy's v. Blundell*, 11 Sim. 467; 1 Ph. 279; 1 H. L. 778; *Stringer v. Gardiner*, 27 B. 35; 4 De G. & J. 468; *Douglas v. Fellows*, Kay, 114; *Dooley v. Mahon*, 1. R. 11 Eq. 299; *In re Twohill*, 3 L. R. Ir. 21; *Patching v. Barnett*, 28 W. R. 886.

In determining whether a legatee fully answers the description, the whole will must be considered. Thus though there may be a person precisely answering to the name given by the testator, it may appear from other parts of the will that that person could not have been intended. *Charter v. Charter*, L. R. 2 P. & D. 315; *ib.* 7 H. L. 364; *In re Wolverton Mortgaged Estates*, 7 Ch. D. 197.

The fact that a legatee has once been accurately described will not prevent his taking another gift under a less full or an inaccurate description. *Doe d. Morgan v. Morgan*, 1 Cr. & M. 235; *Careless v. Careless*, 19 Ves. 604; 1 Mer. 384.

But it will if the two descriptions are so different as to raise a strong probability that the same legatee cannot have been meant. *Lee v. Pain*, 4 Ha. 254.

Name accurate,  
super-added  
description  
inaccurate.

If a legatee is mentioned by name and an erroneous description is added, the name will prevail if there is a person fully answering to the name and no one to answer the description. *Veritas nominis tollit errorem demonstrationis*. *Standen v. Standen*, 2 Ves. jun. 589; 6 B. P. C. 193; *Doe d. Gains v. Rouse*, 5 C. B. 442; *Re Blackman*, 16 B. 377; *Re Ingle's Trusts*, 11 Eq. 578.

Name inaccurate,  
super-added  
description  
accurate.

Similarly, if there is no one to answer the name, a person satisfying the description will take. *Pitcairne v. Brase*, Finch, 403; *Dowset v. Sweet*, Amb. 175; *Parsons v. Parsons*, 1 Ves. jun. 266; *Garth v. Meyrick*, 1 B. C. C. 30; *Doe d. Cook v. Danvers*, 7 East, 229.

Equivocation.

III. If there are several persons who accurately answer the whole description, there is an equivocation, and evidence of the testator's intention is admissible. *Lord Cheney's Case*, 3 Rep. p. 137, fol. 68a.; *Doe d. Morgan v. Morgan*, 1 Cr. & M. 235; *Doe d. Gord v. Needs*, 2 M. & W. 129; *Doe d. Allen v. Allen*, 12 A. & E. 451; *Jones v. Newman*, 1 W. Bl. 60; *Jefferies v. Michell*, 20 B. 15.

And if part of the description applies equally to two persons and the rest of it applies to no one, the portion which has no application may be considered away, so as to raise an equivocation and make evidence of intention admissible. *Price v. Page*, 4 Ves. 680; *Still v. Hoste*, 6 Mad. 192; *Careless v. Careless*, 19 Ves. 604; 1 Mer. 384. These cases are referred to this head by Lord Abinger, C. B., in *Doe d. Hiscock v. Hiscock*, 5 M. & W. 363, 370; but

*quare* whether *Price v. Page* was not a case of equivocation strictly, and whether the latter two cases were not mere cases of misdescription. At any rate, in them no evidence of intention proper was offered, but only evidence of surrounding circumstances.

To raise a case of equivocation it is sufficient, if two persons equally answer the description in a popular sense.

Thus a father and son both equally answer the description John Smith, though properly speaking the son is John Smith the younger. *Jones v. Newman*, 1 W. Bl. 60.

So a person whose name was W. M. and one whose name was W. J. R. B. M. were both held equally to answer the description W. M., since a man is popularly known by his first Christian name. *Bennett v. Marshall*, 2 K. & J. 740.

It makes no difference that the will itself shows that there are two persons equally answering a given description. For instance, if there is a gift to G. G., son of J. G., another to G. G., son of G. G., and a third to G. G., son of G. *Doe d. Gord v. Needs*, 2 M. & W. 129.

But parol evidence is not admissible to show to which of two antecedents in the will a word of reference is to be referred, if, for instance, two Ann Collins's have been mentioned, and there is a gift to the said Ann Collins. *Fox v. Collins*, 2 Ed. 107; *Castledon v. Turner*, 3 Atk. 257.

No case of equivocation arises if it can be gathered from the will which of several persons equally answering the name is meant, as in a devise to M. W., my brother, and to Simon, my brother's son—the son of the brother just mentioned being clearly indicated. *Doe d. Westlake v. Westlake*, 4 B. & Ald. 57; *Healy v. Healy*, I. R. 9 Eq. 418.

And, similarly, if a legatee has once been accurately described, and the same name is afterwards mentioned without the description, evidence is not admissible to show that a different legatee of that name was meant. *Webber*

Equivocation may arise though two persons may not both answer the same description with equal accuracy.

The will may on the face of it raise a case of equivocation.

An apparent case of equivocation may be explained by the will itself

*v. Corbett*, 16 Eq. 515; *Richardson v. Watson*, 4 B. & Ad. 787.

But the case is different if there is first a gift to A. B. and then a gift to A. B. of X., and there are two A. B.'s, one of X. and one not. *Doe d. Morgan v. Morgan*, 1 Cr. & M. 235.

Whether  
nephews  
proper and  
a wife's  
nephews  
are both  
equally  
nephews.

Further, it is clear that if there were a gift to "my nephews" as a class, evidence that the testator generally applied the term to his wife's nephews would not raise a case of equivocation so as to make evidence of intention admissible as between nephews proper and wife's nephews. *Beachcroft v. Beachcroft*, 1 Mad. 430, which may be cited to the contrary, so far as it cannot be upheld *ex visceribus* of the will, has been generally disapproved.

It is equally clear that if the testator at the date of his will had only a wife's nephew called Joseph, the subsequent birth of a brother's son called Joseph would not entitle the latter to take under a gift to my nephew Joseph. And the result would be the same if the testator at the date of his will was not aware that his brother had a son called Joseph. *Doe d. Thomas v. Beynon*, 12 Ad. & E. 431; *Grant v. Grant*, L. R. 5 C. P. 380, *ib.* 727. My nephew Joseph is clearly *persona designata*, and the question then is, whom did the testator mean to point out?

Evidence of intention, though in fact admitted in *Grant v. Grant*, was not necessary for the decision, since the testator cannot have meant to benefit a person of whose existence he was not aware, under a particular name and description, and therefore a case of equivocation cannot be said there to have arisen.

Whether evidence of intention would be admissible if the testator was aware at the date of his will that both his brother and his brother-in-law had sons called Joseph is doubtful, though the judgment in *Grant v. Grant* seems to imply that it would.

IV. If there is a gift by name, with a particular description superadded, and there is some one who answers to the name and some one who answers to the description, no evidence of intention is admissible. *Doe d. Hiscocks v. Hiscocks*, 5 M. & W. 363; *Bernasconi v. Atkinson*, 10 Ha. 345; *Charter v. Charter*, L. R. 2 P. & D. 315, *ib.* 7 H. L. 364.

Case where part of a description applies to one person and part to another.

In some cases, if there is nothing to point out one person more than the other, the gift will be void for uncertainty. *Thomas v. Thomas*, 6 T. R. 671; *Drake v. Drake*, 8 H. L. 172. See *Cope v. Henshaw*, 35 B. 420.

In such cases the rule that the name is to prevail against an error of demonstration can only apply if it is clear that the error is in the demonstration. And therefore either the name or the description will prevail, according as it is reasonably certain that the mistake is more likely to be made in the name than in the description, or *vice versa*.

If the gift is to A. B., second son of C. D., and A. B. is the third son, and there is nothing either in the will or in the relations of the second and third sons to the testator to point out one more than the other, the name will prevail. *Doe d. Chevalier v. Huthwaite*, 8 Taunt. 306; 2 Moo. 304; see 3 B. & Ald. 632; *Pryce v. Newbolt*, 14 Sim. 354; *Garland v. Beverley*, 9 Ch. D. 213; *In re Lyon's Trusts*, 48 L. J. Ch. 245; see, too, *Farrer v. St. Catherine's Coll.*, 16 Eq. 19.

Gift to A., second son of B., where A. is the first son of B.

But it may appear from the will or the relations of the second and third son to the testator, or from the fact that one of the sons was otherwise provided for, whether the name or description was erroneous. Thus, if one of the two was godson or well known to the testator, the other not, the former takes. *Bernasconi v. Atkinson*, 10 Ha. 345; *Gregory's Will*, 34 B. 601; *Hodgson v. Clarke*, 1 D. F. & J. 394.

So if the testator, after a limitation to A. B., the second son of C., limits remainders to the third and fourth sons and so on, the argument is strong that the description and not the name was to prevail. *Bradshaw v. Bradshaw*, 2 Y. & C. Ex. 72; *Neeld v. Neeld*, W. N. 1878, 219.

But this argument was held not to apply where the limitations were to R. G. fourth son of G. G. in fee in case he should attain twenty-one, but if he should die under that age to the fifth son in fee, and so on; and accordingly R. H. G., the third son, took. *Gillett v. Gane*, 10 Eq. 29.

Where the description is careful and elaborate it prevails.

If, on the other hand, the description is such as to particularise a certain person, and to leave no doubt as to which of two persons was meant, the description will prevail. *Smith v. Coney*, 6 Ves. 42; *Lee v. Pain*, 4 Ha. 253; *Adams v. Jones*, 9 Ha. 485; *Charter v. Charter*, L. R. 2 P. & D. 315; *ib.* 7 H. L. 364.

And though there may be a person answering to the name, if there are in the will expressions which show that he could not have been meant, the case falls under the same head, and it becomes a question whether the name or the description is to prevail. *Charter v. Charter*, L. R. 2 P. & D. 315; *ib.* 7 H. L. 364.

Where the description supplies a motive for the gift.

If the description is such as itself to supply a motive for the gift, the description will prevail. *Nunn's Trusts*, 19 Eq. 331; see *Re Fry*, 22 W. R. 679, 813; *Re Blayney's Trust*, 1. R. 9 Eq. 413.

## B. GIFTS TO PERSONS FILLING A CERTAIN CHARACTER.

Gift to a legatee in a certain character.

The mere fact that a gift is made to a named legatee in a certain character, as for instance to my wife A., does not avoid the legacy if the legatee does not happen to fill the

character. *Schloss v. Stiebel*, 6 Sim. 1; *Giles v. Giles*, 1 Keen, 685; *Re Pitt's Will*, 27 B. 576.

If the legatee fraudulently assumed the character for the purpose of deceiving the testator, and procuring a legacy, the question of fraud must be raised in the Court of Probate. A Court of Construction has no jurisdiction to go into the question of fraud where the will has once been proved. *Meluish v. Milton*, 3 Ch. D. 27, overruling *Kennell v. Abbott*, 4 Ves. 802; *Wilkinson v. Joughin*, L. R. 2 Eq. 319; see *Rishton v. Cobb*, 5 M. & Cr. 145; and see *ante*, pp. 22, 69.

Upon the question whether, under a gift of a legacy to Servants. each of the testator's servants, servants who are in the testator's service at the date of the will, but quit it before his decease, are entitled to the legacy, there are two cases apparently directly opposed. Probably the later authority, in which they were held entitled to the legacy, would be followed. *Jones v. Henley*, 2 Ch. Rep. 162; *Parker v. Marchant*, 1 Y. & C. C. 290.

The word servants is not necessarily confined to servants living in the house. It has been held to include a farm-bailiff, a gardener and under-gardener, and a house-steward. *Bulling v. Ellice*, 9 Jur. 936; *Thrupp v. Collett*, 26 B. 147; *Armstrong v. Clavering*, 27 B. 226.

Such persons as stewards of Courts, a coachman provided by a job master, or a boy occasionally employed, are not included under the term servants. *Townshend v. Windham*, 2 Vern. 546; *Chilcott v. Bromley*, 12 Ves. 114; *Thrupp v. Collett*, 26 B. 147.

The term domestic servants would it seems exclude out- Domestic  
door servants. *Ogle v. Morgan*, 1 D. M. & G. 359. servants.

If the gift is of a year's wages it will be limited to Gift of a  
servants hired by the year. *Booth v. Dean*, 1 M. & K. year's  
560; *Blackwell v. Pennant*, 9 H. 551; *Breslin v. Waldron*, wages.  
4 Ir. Ch. 334.

A bequest to the two servants who shall be living with me at my death, has been held to go to all living with the testator at his death, though there may have been only two at the date of the will. *Sleech v. Torrington*, 2 Ves. sen. 560.

Under a bequest to servants "living with me at my decease," servants who have been wrongfully discharged before the testator's death, or voluntarily leaving the service, or dismissed on account of the testator's lunacy, are not entitled to anything. *Darlow v. Edwards*, 1 H. & C. 547; *Re Serres' Estate*; *Venes v. Marriott*, 10 W. R. 751; 31 L. J. Ch. 519; *In re Hartley's Trusts*, 26 W. R. 590.

But a servant who at the testator's death has temporarily left his house and is to return to service is entitled to the legacy. *Herbert v. Reid*, 16 Ves. 481.

Gift to the testator's wife.

In wills under the Wills Act a gift to the testator's wife must mean the person calling herself his wife at the date of the will, as a second marriage operates as a revocation of the will, and therefore a deceased wife's sister may take under the description of the testator's wife. *Pratt v. Matthew*, 22 B. 328; *Pitt's Will*, 27 B. 576; 5 Jur. N. S. 1235.

But *primâ facie* wife means lawful wife. *Davenport's Trusts*, 1 Sm. & G. 126.

Gift to the wife of a third person.

*Primâ facie* a gift to the wife of A. who has a wife living at the date of the will goes to that wife and no other. *Boreham v. Bignall*, 8 Ha. 131; *Burrow's Trusts*, 10 L. T. N. S. 184.

At any rate this is the case if there is anything to show that the testator referred to a person known to him, by adding, for instance, the epithet "beloved." *Niblock v. Garrett*, 1 R. & M. 629.

And when a daughter has been described as wife of A., a subsequent gift to her husband means that husband



only. *Bryan's Trust*, 2 Sim. N. S. 103; *Franks v. Brooker*, 27 B. 635.

But a gift, after a life interest to a son, amongst the wife of the son (in case she should survive him) and all and every the children of the son, has been held to include a second wife, though there was a wife living at the date of the will, as it would include children by a second marriage. *In re Lyne's Trust*, 8 Eq. 65; but see *Firth v. Fielden*, 22 W. R. 622.

And a direction that in case of the bankruptcy of any of the legatees for life, their shares should be applied for the benefit of the wife and children of such legatees during the remainder of the life of the legatee, will include a second wife of one of the legatees who was married at the date of the will; the direction, being applicable to several legatees, some of whom were not married, showing that no particular wife was intended. *Longworth v. Bellamy*, 40 L. J. Ch. 513.

But a similar direction as to the share of one legatee who was married at the date of the will will not include a second wife. *Boreham v. Bignall*, 8 Ha. 131.

If there is no person answering the description at the date of the will or the death, the gift vests indefeasibly in the first person who answers the description. *Radford v. Willis*, 12 Eq. 105, 7 Ch. 7; see *Peppin v. Beckford*, 3 Ves. 570.

Gift to the wife of a person who is unmarried.

As to the effect of a divorce upon a gift to a husband and wife during their joint lives, see *Knox v. Wells*, 2 H. & M. 674.

"If an estate be made of land to a husband and wife and to a third person, in this case the husband and wife have in law in their right but the moiety." *Littleton*, sec. 291. The same rule applies to personalty, and it makes no difference whether the bequest is a joint tenancy or a tenancy in common.

Gifts to husband and wife and a third person.

Thus a bequest to A. and B. his wife and C. as tenants

in common goes in moieties to A. and his wife and to C. *Wylde's Estate*, 2 D. M. & G. 724.

But a similar bequest during their lives and the life of the survivor of them, and after the death of the survivor over, would be enough to show that the wife was to take a separate interest. *Marchant v. Cragg*, 31 B. 398.

If the bequest is to A., B. and C. and the wife of C. equally, the second "and" is looked upon as a *subcopula*, and the property goes in thirds. *Bricker v. Whatley*, 1 Vern. 232.

So, too, if the gift is to A., his wife and children, the husband and wife take one share. *Gordon v. Whieldon*, 11 B. 170; *Atcheson v. Atcheson*, *ib.* 485.

But a very slight evidence of intention that the wife is to take a separate share has been held sufficient to prevent the rule; thus, if the words are to A., B., C. and his wife as tenants in common, husband and wife take several shares. *Warrington v. Warrington*, 2 Ha. 54, where the husband and wife were equally of kin to the testatrix; see, too, *Payne v. Wagner*, 12 Sim. 184.

And apparently if the words are to my son-in-law B. and my daughter P. his wife, their executors, administrators, and assigns, both take equally—the gift not being to husband and wife, but to son-in-law and daughter-in-law. *A.-G. v. Bacchus*, 9 Pr. 30; 11 Pr. 547.

Possibly the rule of the unity of husband and wife would not be applied to a husband and wife living under a foreign law, which recognises the separate existence of the wife. *Dias v. De Livera*, 5 App. C. 123.

Meaning  
of the word  
unmarried  
in a direct  
gift.

Whether a gift to unmarried children is a *designatio personarum* or not depends on the language of the will. Thus, a gift to the son and unmarried daughters of A. goes to the daughters unmarried at the date of the will, the gift to the son showing that particular persons are meant. *Hall v. Robertson*, 4 D. M. & G. 781; see *Elliott v. Elliott*, 11 Ir. Ch. 482.

Where the gift designates a class ascertainable at the testator's death, the subsequent marriage of one of the class will not avoid the gift. *Jubber v. Jubber*, 9 Sim. 503; see *Blagrove v. Coore*, 27 B. 138.

As to whether unmarried in a direct gift means never having been married or not, see *Thistlethwayte's Trusts*, 1 Jur. N. S. 881; 24 L. J. Ch. 713; *Dalrymple v. Hall*, 29 W. R. 421.

A gift to "a son" of a person will, it seems, go to the son living at the date of the gift, if there is one. *Powell v. Davies*, 1 B. 532. Gift to "a son."

If there is no son living it goes to the first son born afterwards, if he survives the testator. *Powell v. Davies*, 1 B. 532; *Ashburner v. Wilson*, 17 Sim. 204; see, too, *Russell v. Russell*, 12 Ir. Ch. 377.

A gift to one of a class, as to one of the sons of a person, is void, though only one member of the class may happen to be living at the death of the testator. *Strode v. Russell*, 2 Vern. 621, 624; *In bonis Baylis*, 1 Sw. & T. 613; *In bonis Blackwell*, 2 P. D. 72; see *Beauchant v. Usticke*, W. N. 1880, 14. Gift to one of a class is void.

The natural meaning of first or second son is first or second in order of birth. Gifts to a first or second son.

1. No difficulty arises where all the sons born are living at the testator's death, or where no sons have then been born. In the latter case, the first or second son born afterwards will take. See *Driver v. Frank*, 3 Mau. & S. 25; 8 Taunt. 468; *Alexander v. Alexander*, 16 C. B. 59; *Bennet v. Bennet*, 2 Dr. & Sm. 266.

The second born son will take as second son, though his elder brother may die before he is born. *Trafford v. Ashton*, 2 Vern. 660.

2. If there is a first son at the date of the will it seems probable that he would take as *persona designata*. *Saunders v. Richardson*, 18 Jur. 714; see *Re Harris*, 2 W. R. 689.

So, too, if there were a first and second son living at the date of the will the second son would probably take under the description second son. Whether the second son at the date of the will whose elder brother had died would take as second son, *quære*.

3. If a first or second son is dead at the date of the will the term will mean first or second son at the testator's death. *King v. Bennett*, 4 M. & W. 36; *Thompson v. Thompson*, 1 Coll. 388,—where the provisions of the will were confirmed by a codicil after the death of the first born son.

4. If a first or second son is born after the date of the will and dies in the testator's lifetime, a first or second surviving son will take. *Lomax v. Holmdon*, 1 Ves. sen. 290.

But this is not the case if the testator contemplates the possibility of lapse and provides for it; for instance, by a gift to the seventh or youngest child of a person who at the date of the will had six children. *West v. Lord Primate of Ireland*, 2 Cox, 258; 3 B. C. C. 148.

Meaning  
of the  
terms  
elder and  
younger.

The terms elder and younger in wills must *primâ facie* be considered as used in their strict sense as applicable to age, and not in the figurative sense of anterior and posterior in order of limitation of estates. *Scarisbrick v. Lord Skelmersdale*, 4 Y. & C. Ex. 78; 2 H. L. 167; *Lyddon v. Ellison*, 19 B. 565; *Livesey v. Livesey*, 2 H. L. 419.

In the case of limitations of real estate devised for life with remainders in tail, the natural meaning of eldest son is first born son. *Bathurst v. Errington*, 2 App. C. 698, 709.

Therefore, under a devise to the eldest son of A. for life with remainder to his first and other sons successively in tail, with remainder to the second and other sons of A. successively in tail, if the first born son of A. dies in the testator's lifetime without issue, A.'s second son takes an estate tail. *Meredith v. Treffry*, 12 Ch. D. 170.

The term eldest son may mean only son, as youngest child may mean only child. *Tuite v. Birmingham*, L. R. 7 H. L. 634; *Emery v. England*, 3 Ves. 232.

If the testator contemplates a younger son as becoming eldest, or if the eldest were dead at the date of the will, eldest son can, of course, not mean first born son. *Hervey-Bathurst v. Stanley*, 4 Ch. D. 251; S. C. sub. nom. *Bathurst v. Errington*, 2 App. C. 698.

A clause shifting estates in the event of a younger son becoming the eldest son of his father applies only to a son becoming the eldest in his father's lifetime. *Bathurst v. Errington*, 2 App. C. 698.

When a testator has made dispositions in favour of his sons, arranging them in a descending order of birth with a gift over of their respective shares in certain events to "my next surviving son," the next younger son takes under this description. *Eastwood v. Lockwood*, L. R. 3 Eq. 487.

In the case of a bequest of personalty, whether immediate or in remainder, to the eldest child of a person, the eldest child living at the testator's death will take, though he may not have been the eldest at the date of the will. *Re Harris' Trust*, 2 W. R. 689.

With regard to the period at which the class of younger children is to be ascertained—

If there is an immediate gift to younger children the class will be ascertained at the testator's death, and a child who after that time becomes eldest will not be excluded. *Coleman v. Seymour*, 1 Ves. sen. 209; *Umbers v. Jaggard*, 9 Eq. 201.

Similarly, if the gift is to younger children who attain twenty-one, a child who is a younger child when it attains twenty-one will take, though it may afterwards become eldest. *Adams v. Roberts*, 25 B. 658. The decision in *Matthews v. Paul*, 3 Sw. 328, may be supported on the

Next surviving son.

The class of younger children is to be ascertained at the period of vesting.

ground that the son excluded was the eldest at the time of vesting as well as at the time of distribution.

In the same way an eldest son to be excluded will be ascertained at the time of vesting and not at the time of distribution. *Sandeman v. Mackenzie*, 1 J. & H. 613; *Adams v. Bush*, 8 Sc. 405; 6 Bing. N. C. 164; *Theed's Settlement*, 3 K. & J. 375; *Adams v. Adams*, 25 B. 642.

Contrary  
intention.

The testator may, however, show that the persons filling the character of eldest or youngest children were to be ascertained at the time of distribution by contemplating, for instance, the possibility that several persons successively might become eldest sons after the time of vesting. *Bowles v. Bowles*, 10 Ves. 177; *Livesey v. Livesey*, 2 H. L. 419; *Madden v. Ikin*, 2 Dr. & S. 207.

Gift to  
a class of  
younger  
children  
upon a con-  
tingency.

Where the gift is to younger children upon some contingency, the cases are conflicting.

If there are no children surviving when the contingency happens the gift goes to the representatives of those who died in the lifetime of an elder brother. *Lady Lincoln v. Pelham*, 10 Ves. 166.

If there are children living when the contingency happens, *Ellison v. Airey*, 1 Ves. sen. 111, and *Hall v. Hewer*, Amb. 204, are direct authorities for saying that the eldest child is to be then ascertained, and not before. See, too, *Stevens v. Pile*, 30 B. 284.

But now it would probably be held that the class ought to be ascertained at the time when the interests become transmissible, and it was so decided in *Bryan v. Collins*, 16 B. 14. See, too, *Sanders' Trust*, L. R. 1 Eq. 675.

Meaning of  
"entitled."

The exclusion from a class of a child "entitled" to certain property means *primâ facie* entitled in possession. *Chorley v. Loveland*, 33 B. 189; 12 W. R. 187; *Umbers v. Jaggard*, 9 Eq. 201.

See further as to the construction of similar clauses of

exclusion, *Wyndham v. Fane*, 11 Ha. 287; *Johnson v. Foulds*, 5 Eq. 268; *Re Gryll's Trust*, 6 Eq. 589.

When, however, the testator has placed himself *in loco parentis*, and shows an intention to provide portions for younger children, the rule established with regard to marriage settlements, that elder son means a son taking the bulk of the estate, and younger son a son unprovided for, applies to wills, as well in the case of personalty as of realty. *Bayley's Settlement*, 9 Eq. 491; 6 Ch. 590.

In what cases eldest son means a son taking the bulk of the estates.

In such cases the rule is that where the bulk of an estate is settled in strict settlement, and by the same settlement portions are provided for younger children, no child taking the bulk of the estate by virtue of the limitations in strict settlement shall take any benefit from the portions. *Macoubrey v. Jones*, 2 K. & J. 684, 690.

Even in marriage settlements, however, this construction will not be adopted, unless it appears upon the face of the instrument that the exclusion had reference to the fact of the person to be excluded taking other property. *Re Theed's Settlement*, 3 K. & J. 375; *Hervey-Bathurst v. Stanley*, 4 Ch. D. 251, 262.

The time for ascertaining who fills the character of eldest son is the period of distribution, but he need not then be entitled to the settled estate if he has substantially had the benefit of it. *Collingwood v. Stanhope*, L. R. 4 H. L. 43.

And a younger son who at that time has become the eldest, and takes the estate will be excluded from a portion, though the portion may have already vested in him. *Gray v. Earl of Limerick*, 2 De G. & S. 370; *Richards v. Richards*, Johns. 754; *Davies v. Huguenin*, 1 H. & M. 730; *Swinburne v. Swinburne*, 17 W. R. 47; see *Leake v. Leake*, 10 Ves. 476.

Younger son may mean son not taking the family estate.

If, however, the eldest son is excluded not as eldest son,

but by name, the rule does not apply. *Wood v. Wood*, 4 Eq. 48.

In what cases the eldest son is to be ascertained at the period of vesting.

There may, however, be circumstances showing that the eldest son is to be ascertained at some other time than the period of distribution; for instance, at the time of vesting.

A mere gift over to take effect on a younger son becoming an eldest before attaining twenty-one will not alter the rule. *Bayley's Settlement*, 9 Eq. 491; 6 Ch. 590.

But if there is a clear intention that the portions are to vest indefeasibly before the time of distribution, the elder son is ascertained at the time of vesting. *Windham v. Graham*, 1 Russ. 331; see *Ex parte Smyth*, 12 Ir Ch. 487; *Re Rivers' Settlement*, 40 L. J. Ch. 87.

Under what title a son must take the family estates in order to be excluded from a portion.

The further question arises in what manner the younger child must be entitled to the estate in order to be excluded from a portion.

A second son, becoming an eldest son, but prevented from taking the estate by a recovery suffered in the lifetime of his brother, is entitled to share in portions provided by the settlement for younger children. *Tennison v. Moore*, 13 Ir. Eq. 424; *Spencer v. Spencer*, 8 Sim. 87; *Macoubrey v. Jones*, 2 K. & J. 684; *Adams v. Beck*, 25 B. 648, overruling *Peacocke v. Pares*, 2 Kee. 689.

So, too, a younger son succeeding to the reversion of the settled estates, not under the settlement creating the portions, but by descent or by devise, is not within the rule, and does not lose his right to a portion. *Sing v. Leslie*, 2 H. & M. 68; *Adams v. Beck*, 25 B. 648.

An elder son not taking the estate may be entitled to a portion.

On the other hand, as a younger child becoming elder is excluded from taking a portion, so an elder child not taking the estate is admitted to a portion. *Duke v. Doidge*, 2 Ves. sen. 203.

And if he dies before the period of distribution his representatives are entitled, whether the exclusion is of



the eldest son for the time being, or not. *Ellison v. Thomas*, 2 Dr. & Sm. 111; 1 D. J. & S. 18; *Davies v. Huguenin*, 1 H. & M. 730; *Swinburne v. Swinburne*, 17 W. R. 47.

An elder son has been included under the expression second and other sons, in cases where the probability was that the elder had been left out by mistake. *Langston v. Langston*, 8 Bl. N. S. 16; 2 Cl. & F. 194; *Blake's Estate*, 19 W. R. 765; *Tavernor v. Grindley*, 32 L. T. N. S. 424. Gift to second and other sons has in some cases included a first son already.

But this construction will not be adopted when there are sufficient reasons for the exclusion of the elder son. *Birmingham v. Tuite*, 1 R. 7 Eq. 221; L. R. 7 H. L. 634.

## CHAPTER XXIII.

## CONSTRUCTION OF GIFTS TO CHILDREN.

## A. ILLEGITIMATE CHILDREN.

Children  
means legi-  
timate  
children.

I. "THE description child, son, issue, every word of that species, must be taken *primâ facie* to mean legitimate child, son, or issue:" *per* Lord Eldon, *Wilkinson v. Adam*, 1 V. & B. 422. And it may be stated as a general rule that where there is a bequest to children without anything on the face of the will to show that the testator meant by children illegitimate children, and there is a possibility at the date of the will of legitimate children to satisfy the terms of the bequest, evidence *dehors* the will will not be admitted to prove that the testator may or must have meant illegitimate children. *Durrant v. Friend*, 5 De G. & S. 343; *Re Davenport's Trusts*, 1 Sm. & G. 126; *Re Overhill's Trusts*, 1 Sm. & G. 362; *Medworth v. Pope*, 27 Beav. 71; *Warner v. Warner*, 15 Jur. 141; 20 L. J. Ch. 273; and see *Gabb v. Prendergast*, 1 K. & J. 439; *Godfrey v. Davis*, 6 Ves. 43; *Kenebel v. Scrafton*, 2 East, 530; *Harris v. Lloyd*, T. & R. 310; *Mortimer v. West*, 3 Russ. 370; *Bagley v. Mollard*, 1 R. & M. 581; *Swaine v. Kennerley*, 1 V. & B. 469; *Meredith v. Farr*, 2 Y. & C. 525.

The same rule applies where the words next of kin are used. *Re Standley's Estate*, L. R. 2 Eq. 303.

In the will of a Jew domiciled in England, children must mean legitimate children according to English and not according to Jewish law. *Levy v. Solomon*, 25 W. R. 842.

In the case of a gift to the children of a person having a foreign domicile, the children need not be legitimate according to English law, if they are legitimate according to the law of their parents' domicile. *In re Goodman's Trusts*, 14 Ch. D. 619; reversed on appeal, overruling so far as *contra In re Wright's Trusts*, 2 K. & J. 595; *Boyes v. Bedale*, 1 H. & M. 798. See *In re Wilson's Trusts*, L. R. 1 Eq. 247; *ib.* 3 H. L. 55.

In the absence of direct evidence of the marriage of the parents of the children, it may be proved by reputation. *Lyle v. Ellwood*, 19 Eq. 98; *Collins v. Bishop*, 48 L. J. Ch. 31.

II. But under the description of child, son, issue, and similar words, illegitimate children may take if they have acquired the reputation of being children of the person in question in the following cases:

1. If looking at the circumstances existing at the date of the will there is no possibility of legitimate children to satisfy the terms of the bequest.

In what cases illegitimate children may take.  
  
When there is no possibility of legitimate children.

(a) If, for instance, the bequest is to the children of A. now living, and A. has only illegitimate children, they would take. *Dover v. Alexander*, 2 Hare, 282, per Wigram, V.-C.

(b) So if it appears from the language of the will that children living at the date of the will are meant, and there are only illegitimate children then living, they will take.

Thus in *Holt v. Sindrey*, 7 Eq. 170, there was a bequest to the testator's "daughter Mary, the wife of John Lattimer," and after her death "unto all and every the child or children of his said daughter begotten or to be begotten." It appeared that Mary was not the lawful wife of John Lattimer, and that the testator was not aware of this fact. Stuart, V.-C., held that illegitimate children born at the date of the will were sufficiently described by the words "children begotten." See, too, *In re Dixon*, 2 Jur. N. S. 970; *Gabb v. Prendergast*, 1 K. & J. 439.

And in *Savage v. Robertson*, 7 Eq. 176, a bequest to "my sister, Mary Robertson, and her two youngest daughters," Mary Robertson being a spinster, was held a sufficient designation of her two youngest illegitimate daughters. See *Hartley v. Tribber*, 16 B. 510; *Laker v. Hordern*, 1 Ch. D. 644.

A direction, however, to divide property into shares corresponding in number with the number of legitimate and illegitimate children of a person at the date of the will, is not in itself a sufficient indication that illegitimate children then living are meant to be included, since, if before the testator's death one or more of the children had died, the division prescribed by the will would have been inapplicable. *Cartwright v. Vaudry*, 5 Ves. 530; *In re Wells' Estate*, 6 Eq. 599.

(c) If the gift is to the children of a deceased person who had only illegitimate children, the illegitimate children take. *Lord Woodhouselee v. Dalrymple*, 2 Mer. 419; *Edmunds v. Fessey*, 29 Beav. 233.

(d) If the gift is to the children in the plural of a deceased person who had only one legitimate child and one or more illegitimate children, they will all take in order to satisfy the plural number. *Gill v. Shelley*, 2 R. & M. 336; *Leigh v. Byron*, 1 Sm. & G. 486; but see *Hart v. Durand*, 3 Anstr. 684.

If, however, it does not appear on the face of the will that the person to whose children the bequest is given was dead at the date of the will, and the testator was not a near relation, it will not be presumed that he knew of the death, but evidence will be admitted to show that he was aware of it. See *Herbert's Trusts*, 1 J. & H. 121; *Milne v. Wood*, 42 L. J. Ch. 545.

(e) The description "children" will also be taken to mean illegitimate children when the gift is to the children of two persons who cannot by any possibility have legiti-

mate children between them. *Bayley v. Snelham*, 1 S. & St. 78.

(f) And it seems that a bequest by an unmarried man or woman to his or her children must mean illegitimate children, because every will since the Wills Act made by a man or woman is revoked by his or her marriage (see sec. 18), and, therefore, none but illegitimate children could by any possibility take under it. See *Pratt v. Matthew*, 22 Beav. 328; and *Clifton v. Goodbun*, 6 Eq. 278.

But under a gift to the children of a living person, when there is no evidence on the face of the will to show that illegitimate children are intended, legitimate children alone will take. And this will be the case—

Circumstances insufficient to admit illegitimate children.

Though the person whose children are to be benefited has, at the date of the will, only illegitimate children, and at the testator's death there is no possibility of any others. *Godfrey v. Davis*, 6 Ves. 43; *Re Davenport's Trusts*, 1 Sm. & G. 126; *Kelly v. Hammond*, 26 B. 36; *Dorin v. Dorin*, L. R. 7 H. L. 568.

It will also be the case, though the person to whose children a gift is bequeathed has, at the date of the will, only illegitimate children, and is, whether from old age or other causes, never likely to have any others. *Re Overhill's Trust*, 1 Sm. & G. 362; *Paul v. Children*, 12 Eq. 16.

There are, however, two cases in which this rule has not been followed. *Fraser v. Piggott*, You. 354, before Lord Lyndhurst; and *Beachcroft v. Beachcroft*, before Sir Thomas Plumer, M. R., 1 Mad. 430. In the former, after a bequest to the testator's grandchildren, being children of his sons, whether born in wedlock or not, there was a gift of residue to his two sons, and if either died his moiety to go to his children equally. Both sons died in the testator's lifetime. One had only illegitimate children, the other legitimate and illegitimate children. Lord Lyndhurst held that the

*Fraser v. Piggott, Beachcroft v. Beachcroft* discussed.

illegitimate children of the son, who had no others, and the legitimate children alone of the other son were entitled. Lord Lyndhurst lays down, "If there be no legitimate children, then extrinsic evidence may be given of the persons who were intended."

The same would seem to follow from the decision of Sir Thomas Plumer in *Beachcroft v. Beachcroft*, which was the case of a bequest by an unmarried man to "my children." See, too, *Laker v. Hordern*, 1 Ch. D. 644.

These cases have, however, been repeatedly questioned. See *James v. Smith*, 14 Sim. 216; *Re Overhill's Trusts*, 1 Sm. & G. 362; *Holt v. Sindrey*, 7 Eq. 170. And so far as they go to establish a rule that a gift by will to the children of a living person, who at the date of the will has only illegitimate children, and never has any others, is good as regards the illegitimate children, they cannot be held to be law. It may, however, be noticed that the decision in *Beachcroft v. Beachcroft* may be upheld on grounds independent of any such rule. The Master of the Rolls seems to adopt the principle that children means present children: "It is unreasonable to suppose that a man sitting down to make his will and intending bounty to the children of a certain individual, should not have in his mind some present person to fill that character;" but afterwards he lays stress upon the words "mother of my children," as indicating that the testator meant illegitimate children, for, he asks, "Did anybody ever describe his wife by the term mother of my children?" p. 444; and finally he says, "I think *ex visceribus* of the will, the legatees whom this testator must have intended to describe were not the possible progeny of after marriage but existing persons, children already born." So that the case would rather seem to be one in which the testator has on the face of his will shown that he meant illegitimate children to take. See *per* Stuart, V.-C., *Re Overhill's Trusts*, 1 Sm. & G. 362.

2. Illegitimate children existing at the date of the will, including a child then *en ventre*, may take under the term children if they are sufficiently indicated, that is to say, where "taking the will as the dictionary of the meaning of the terms used in it," it appears that the testator meant illegitimate children. *Wilkinson v. Adam*, 1 V. & B. 422, p. 462; *Hill v. Crook*, L. R. 6 H. L. 265. "The intention need not be expressed in language which is necessarily susceptible of only one interpretation, but it is sufficient if it is indicated in a way that excludes the probability of an opposite intention having existed in the mind of the testator." *Hill v. Crook*, L. R. 6 H. L. 277, *per* Lord Chelmsford.

The testator may show that he meant illegitimate children.

a. Thus natural children, born at the date of the will, of course take where the gift is to natural children in express terms. *Metham v. Duke of Devonshire*, 1 P. Wms. 529; *Barnett v. Tugwell*, 31 B. 232; *Evans v. Massey*, 8 Price, 22; *Beniley v. Blizzard*, 4 Jur. N. S. 652.

b. So if after a gift to the children of A., the testator in a subsequent gift defines whom he means, by adding "namely," and inserting their names. *Meredith v. Farr*, 2 Y. & C. C. 525.

c. If there is a gift to the children of the testator by a particular woman, when it appears on the face of the will that he has a wife living, or to "my wife A. for life, and after her death to my children," where the testator is not married to A., but has a wife living from whom he is separated, his children by A. will take. *Wilkinson v. Adam*, 1 V. & B. 422; *Lepine v. Bean*, 10 Eq. 160. See *Bayley v. Snelham*, 1 S. & St. 78.

d. A convenient rule of construction might very fairly have been deduced from the judgments of the House of Lords, in *Hill v. Crook*, L. R. 6 H. L. 265, to the effect that where a testator describes A. as the wife of B. when he knows that A. is not in fact lawfully married to B., and by that description gives property to her for life with

Gift to A., wife of B., and then to her children.

remainder to her children, the term children must be taken to include A.'s children by B. See *per* Earl Cairns, L. R. 6 H. L. p. 285.

The Courts have, however, refused to adopt this rule, and as the cases stand, it appears to be necessary to make the following distinctions:—

A gift to "my daughter A. the wife of B.," and then for the "children of my said daughter," where A. and B. can by no possibility have legitimate children between them, will include the illegitimate children of A. by B. *Hill v. Crook*, L. R. 6 H. L. 265; *Perkins v. Goodwin*, W. N. 1877, 111.

But the same rule does not apply if A. and B., though unmarried at the date of the will, may marry and have legitimate children. *In re Ayles' Trusts*, 1 Ch. D. 282; *In re Yearwood's Trusts*, 5 Ch. D. 545; *Ellis v. Houston*, 10 Ch. D. 236. In the first of these cases it does not appear whether the testator knew that A. and B. were unmarried at the date of the will.

e. Under a gift to the children of the testator's daughter by her present putative husband or by any other person whom she might marry, though the daughter subsequently married her then putative husband, her illegitimate son by him took. *In re Brown's Trust*, 16 Eq. 239; *In re Connor*, 2 J. & Lat. 456; *Dilley v. Matthews*, 13 W. R. 676; 11 Jur. N. S. 425.

Illegitimate child called a child.

f. If the testator expressly includes an illegitimate child in the word children, for instance by a recital that the testator has certain children among whom he enumerates an illegitimate child, or the like, the illegitimate child will take under a subsequent gift to children. *Owen v. Bryant*, 2 D. M. & G. 697; *Worts v. Cubitt*, 19 B. 421; *Evans v. Davies*, 7 H. 498.

So, too, it would seem that if the testator describes an illegitimate nephew as his nephew, a subsequent gift to the



children of his nephews would include the children of the illegitimate nephew. *Tugwell v. Scott*, 24 B. 141; *Allen v. Webster*, 6 Jur. N. S. 574.

The fact that an illegitimate child has been described as a child in a gift to him would not be sufficient to show that he was intended to be included in a subsequent gift to children. *In re Hindle*; *Megson v. Hindle*, 28 W. R. 866; 15 Ch. D. 199; see *Bagley v. Mollard*, 1 R. & M. 581.

III. It has sometimes been laid down that legitimate and illegitimate children cannot together take under the same description or the same class. For instance, in *Bagley v. Mollard*, 1 R. & M. 581, the M. R. said, "Whenever the general description of children will include legitimate children it cannot also be extended to illegitimate children," p. 586. See, too, *per* Lord Romilly, M. R., in *Pratt v. Matthew*, 22 Beav. 328. "It is also clear that illegitimate children cannot take under a gift to children unless it be quite clear on the face of the gift that legitimate children never could have taken under the gift." As early an authority, however, as *Wilkinson v. Adam*, 1 V. & B. 422, seems to point the other way (see especially the opinion of the judges there stated), though the exact point was not decided, but there is no doubt now since the case of *Hill v. Crook*, L. R. 6 H. L. 265, that a gift to children, with a clear intention that it shall apply to existing illegitimate children, will be so applied, although the gift must be extended to future legitimate children.

Whether legitimate and illegitimate children can take together under one description.

IV. A bequest to future illegitimate children, born between the date of the will and the testator's death where they are sufficiently designated, is good as regards those children who have at the time of the testator's death acquired the reputation of being the children in question.

Bequest to future illegitimate children.

Previously to the case of *Occleston v. Fullalove*, 9 Ch. 147, the general current of authority seems to have been

in favour of the opinion that no gift, however express, to unborn illegitimate children would be allowed by law, and that under a gift, good as to illegitimate children as a class, no illegitimate children born after the date of the will would be permitted to take. (See *per* Lord Chelmsford in *Hill v. Crook*, L. R. 6 H. L. 278.) This opinion was frequently expressed incidentally by the Judges (see, for instance, *per* Lord St. Leonards in *In re Connor*, 2 J. & Lat. 460; Lord Romilly, *Medworth v. Pope*, 27 Beav. 73; *Holt v. Sindrey*, 7 Eq. 176, and *per* Lords Chelmsford and Colonsay in *Hill v. Crook*, L. R. 6 H. L. 265); but the exact point does not appear to have been decided till *Howarth v. Mills*, L. R. 2 Eq. 391. In that case there was a bequest by a single woman, "to each and every of my children, legitimate or otherwise, who shall be living at the time of my decease," and Lord Hatherley held that illegitimate children born after the date of the will could not take. See also *Metham v. Duke of Devon*, 1 P. Wms. 529, and the remarks on that case by the L. J. James in *Occleston v. Fullalove*, L. R. 9 Ch. p. 167. The grounds of the opinion and the decision based upon it were that a gift to future illegitimate children is against public policy, as being an inducement to vice; but the decision of the Lords Justices of Appeal in *Occleston v. Fullalove*, 9 Ch. 147, has now settled that there is no rule of policy preventing gifts by will to future illegitimate children where it is sufficiently clear that they were intended to take, and *Howarth v. Mills* is therefore overruled.

It is a question of some interest whether the judgment of the Lords Justices in *Occleston v. Fullalove* would be upheld by the House of Lords, and considering the adverse judgment of Lord Selborne and the dicta of Lords Chelmsford and Colonsay in *Hill v. Crook*, not dissented from by Lord Cairns, to which must be added the decision

of Lord Hatherley in *Howarth v. Mills*, there may be some doubt upon this point.

A gift to future illegitimate children is against public policy, it is said, because it encourages immoral connections and discourages marriage. It is, however, difficult to see how a gift by will which, till the death of the testator, is of no effect, whatever it may be morally, can legally be said to be a consideration or inducement to immorality. If a man were to make a settlement by deed upon himself for life, with remainder to such illegitimate children whom he might at the time of his death be reputed to have by a certain woman, as he should by will appoint, and in default of appointment over, with a general power of revocation, apparently no appointment as to after-born illegitimate children would be good, though the deed may not have been communicated to anyone: see *Dover v. Alexander*, 2 Ha. 275. And the distinction between such a deed and a gift to after-born illegitimate children by will is, no doubt, difficult to draw. But the distinction between cases on either side of a boundary line is necessarily subtle and technical. A deed speaks from its execution, a will is effectual only from the testator's death. A deed is a legal and formal document, requiring a formal execution of the power of revocation; a will is informal and can be revoked or modified in a manner equally informal. In the case of a deed, with a power of revocation, there is a *prima facie* presumption that it will not be revoked, as revocation would involve trouble and expense, which would not be incurred, or incurred in less measure, in the case of a will. Under these circumstances the distinction, though practically evanescent, may very well be upheld as a matter of legal convenience. At any rate, if the distinction between such a deed as before mentioned and a will is refined, the distinction which would make a bequest to an illegitimate child the day

before it is conceived bad, and a similar bequest the day after it is conceived good, is on grounds of public policy equally refined. The inducement, if any, to immorality, when once the strictly legal conception of consideration is departed from, lies as much in the capacity of benefiting illegitimate children by will at all, as of benefiting future illegitimate children.

Whether  
express re-  
ference to  
repute is  
necessary.

The decision in *Occleston v. Fullalove*, while deciding that future illegitimate children may take under a gift by will, if sufficiently described, leaves some doubts on the question of what description will suffice. The gift there was "to all other children which the testator might have or be reputed to have by M. L., then born or thereafter to be born," and the Lords Justices laid stress upon the word reputed, as obviating any difficulty which might arise if it were necessary to inquire into the fact of paternity—an inquiry which the law will not undertake. "A man makes a gift 'to my future children by A. B. ;' there is a condition annexed to the gift that they shall be really his children ; but that is a condition the existence or non-existence of which it is impossible to ascertain. His access or non-access, the access or non-access of any other person or persons, the more or less profligacy or immorality of the female, the signs of race or caste, or blood, might have all to be inquired into and brought into public discussion before it could be ascertained whether or not they were his children. The law forbids such inquiries, and, except in exoneration of parish rates, accepts no evidence of actual paternity but the marriage union," *per* Lord Justice James, *Occleston v. Fullalove*, p. 163 ; and "the cases appear to establish that a bequest to the future illegitimate children of a man is void for uncertainty, because the law will not allow evidence to be given that they are the actual children of the man," *per* Lord Justice Mellish, *ib.* 170. These remarks seem to imply that where

future illegitimate children of a particular father are referred to they can only take under a form of words descriptive of the reputation and not the fact of paternity. But the distinction appears to be unimportant, and in *In re Goodwin's Trusts*, 17 Eq. 345, where there was a bequest by a woman to "all and every her children and child by Richard Perkins," the M. R. held that an after-born child, who at the time of the testator's death had acquired the reputation of being her child by Richard Perkins, was entitled.

This case, it may be noticed, also decides that words of futurity are not necessary to enable after-born illegitimate children to take unless a distinction could be drawn between "her children" and "all and every her children."

V. Illegitimate children born after the death of the testator, unless *en ventre* at that time, can in no case take under his will. Such a gift would, in fact, be the same as a gift by deed upon an immoral condition. *Crook v. Hill*, 24 W. R. 876; 3 Ch. D. 773.

VI. With regard to an illegitimate child *en ventre sa mère* at the date of the will, such a child can take if it is sufficiently designated; thus, a bequest to the child with which a woman is at the time pregnant is a good bequest, as there can be no uncertainty. *Evans v. Massey*, 8 Pr. 22; *Gordon v. Gordon*, 1 Mer. 142.

And where a gift to the children of a woman applies to illegitimate children, an illegitimate child *en ventre* at the date of the will is admitted to share. *Hill v. Crook*, 3 Ch. D. 773.

But if a child is described with reference to its father there seems to be considerable doubt whether the bequest is not void for uncertainty. To establish the fact of paternity would involve an inquiry which the law will not allow, and it is doubtful whether an illegitimate child can acquire a title by repute till it is born. See *Earle v. Wilson*, 17 Ves. 528.

Words of futurity not necessary.

Illegitimate children born after the testator's death.

Illegitimate child *en ventre* at the date of the will.

Whether child *en ventre* can acquire a title by repute.

In *Gordon v. Gordon* (sup. cit.), Lord Eldon says: "A bastard cannot take as the issue of a particular person until it has acquired the reputation of being the child of that person, which cannot be before its birth." (See, too, *Metham v. Duke of Devon*, 1 P. Wms. 529; *Blodwell v. Edwards*, Cro. El. 509; see 1 Co. Litt. 3 b.)

On the other hand, both Lord St. Leonards and Lord Romilly seem to have thought that an illegitimate child *en ventre* may have a name by reputation. "A child *en ventre sa mère* is a child *in esse*, and may have a name by reputation," *per* Lord St. Leonards in *In re Connor*, 2 J. & Lat. p. 460; and "It is undoubtedly true that a child *en ventre sa mère* may acquire a name by reputation although illegitimate," *per* Lord Romilly in *Pratt v. Matthew*, 22 B. 339. On practical grounds there seems to be no reason why an illegitimate child *en ventre sa mère* should not acquire a title by reputation, and looking at the tendency of the more recent decisions, ending with *Occleston v. Fullalove*, the probability seems to be that the Courts would adopt the opinion of Lords St. Leonards and Romilly.

Whether child *en ventre* at the death will take under a gift to future illegitimate children.

VII. Where there is a bequest to future illegitimate children, but without a specific description which could apply to a child *en ventre* at the testator's death:

If the gift is to the illegitimate children of a woman, a child *en ventre* at the time of the testator's death will be admitted to take. When the so-called rule of public policy against bequests to illegitimate children born between the date of the will and the testator's death is rejected, there is no reason why illegitimate children *en ventre* should be treated by the law with less favour than legitimate. *Hill v. Crook*, 3 Ch. D. 773.

Where the gift, however, is to future illegitimate children with a reference to the father, the same difficulty with regard to reputation arises as in the case previously

mentioned. If, however, a bastard *en ventre* can acquire a title by repute, it seems it would take under the gift in question if the repute is acquired at the time of the testator's death, which appears to be the proper limit for fixing it. See *per* Lord Justice Mellish, L. R. 9 Ch. 171.

### B. LEGITIMATE CHILDREN.

1. *Children primâ facie* includes children by a first and second marriage. *Barrington v. Tristram*, 6 Ves. 345; *Critchett v. Taynton*, 1 R. & M. 541. The term children includes children by a first and second marriage.

And even where there was an express reference to a present or any future husband, children by a former husband were not excluded. *Pasmore v. Huggins*, 21 B. 103; *Re Pickup's Will*, 1 J. & H. 389.

But there may be an intention to exclude the children of a first marriage. *Stavers v. Barnard*, 2 Y. & C. C. 539; *Lovejoy v. Carter*, 35 B. 149.

2. A gift to the children of a living person will not go to his grandchildren, though he may have only grandchildren living at the date of the will and the testator's death. *Moor v. Raisbeck*, 12 Sim. 123. Children do not include grandchildren.

If, however, the gift is to the children of a person deceased, who had only grandchildren living at the time, the grandchildren will take, and they will take to the exclusion of great-grandchildren. *Berry v. Berry*, 3 Giff. 134; 9 W. R. 889; *Fenn v. Death*, 23 B. 73.

But a gift to the children of a deceased person, who has only grandchildren living at the date of the will, will not go to the grandchildren if the will distinguishes between children and grandchildren. *Loring v. Thomas*, 3 Dr. & S. 497.

And a gift to the children of several persons deceased will not include the grandchildren of one who had no

children at the date of the will if there are any children of the others to take. *Radcliffe v. Buckley*, 10 Ves. 195.

Gift to children to be born will not exclude those born already.

3. A gift to children hereafter to be born or that may be born will not, without more, exclude children already born. *Hibblethwait v. Cartwright*, Ca. tem. Talb. 31; *Wilkinson v. Adam*, 1 V. & B. 422, 464; *Harrison v. Harrison*, 1 R. 10 Eq. 290.

But where there are gifts to three out of four children living at the date of the will, a gift to each child that may be born applies only to after-born children. *Early v. Middleton*, 14 B. 453; 3 D. F. & J. 1.

Posthumous children.

And in the same way a testator may confine his bounty to posthumous children. *Doe d. Blakiston v. Haslewood*, 10 C. B. 544; see *White v. Barber*, 5 Burr. 2703; *Re Lindsay*, 3 Ir. Ch. 239.

After-born children, where excluded.

4. Words *primâ facie* referring to present children, such as "to children lawfully gotten," or "to every child he hath," will not exclude after-born children if they can fairly be construed as referring to the *stirps*. *Browne v. Groombridge*, 4 Mad. 495; *Ringrose v. Bramham*, 2 Cox, 384; see *Goodfellow v. Goodfellow*, 18 B. 356.

A gift to "children who survive me" will not exclude those born after the testator's death. *Re Clarke's Estate*, 3 D. J. & S. 111.

Express gift to a child will not exclude him from a subsequent gift to children.

5. An express gift to one child will not prevent his taking under a subsequent gift to children. *Reay v. Rawlins*, 29 B. 88; see *Hanna v. Bell*, 7 Ir. Ch. 208.

Nor will a gift to A. and her daughter for their lives exclude the daughter from taking under a gift in remainder to the children of A. and her daughter. *Almack v. Horn*, 1 H. & M. 630.

On the other hand, a gift to several children by name will not prevent other children from taking under a subsequent gift to children. *Moffatt v. Burnie*, 18 B. 211; see *Re Connor*, 8 Ir. Eq. 401.



6. When there is a gift to the members of a class for their lives, with remainder to their children, the death of a member of the class in the lifetime of the testator after the date of the will will not prevent his children from taking, but the children of members of the class dead at the date of the will will not take. *Habergham v. Ridehalgh*, 9 Eq. 395.

Children of parents dead at the date of the will.

On the other hand, if the gift is to the testator's brothers and sisters for their lives, with remainder to their children, and the testator has only one brother living at the date of the will, children of deceased brothers and sisters will take. *Barnaby v. Tassell*, 11 Eq. 363.

7. In a gift to the children of A. and B. :—

Gift to the children of A. and B.

a. If A. and B. are described as bearing the same relation to the testator, and equal legacies have been given to them, the children of both take—as in a gift to the children of my brother A. and my brother B. *Mason v. Baker*, 2 K. & J. 567; see *Whicker v. Mitford*, 3 B. P. C. 442.

b. If they do not bear the same relation to the testator, and A. has children at the date of the will, while B. is unmarried, the gift goes to B. and the children of A. *Stummvoll v. Hales*, 34 B. 124.

c. So, too, if A. is described as deceased; for instance, if the gift be to the children of the late A. and B., B. and the children of A. will take. *Lugar v. Harman*, 1 Cox, 250; *Hawes v. Hawes*, 14 Ch. D. 614; but see *Re Davies' Will*, 29 B. 93.

This is *a fortiori* the case where B. is referred to as a legatee. *Ingle's Trusts*, 11 Eq. 578.

d. A gift for “the benefit of the children of A. and of B.” goes to the children of A. and of B. *Peacock v. Stockford*, 3 D. M. & G. 73.

8. If there is a gift to the six children of A. who has only six living at the date of the will, the legacy goes to them. *Sherer v. Bishop*, 4 B. C. C. 55.

Gift to a certain number of children when there are more.

And a seventh child *en ventre* at that time will not be admitted to a share. *Re Emery's Estate*, 24 W. R. 917.

But if the number does not correspond with the number living at the date of the will, all the children then living will take, whether the gift is of a lump sum or of a distinct sum to each, in which latter case each child will be entitled to a legacy of that sum. *Garvey v. Hibbert*, 19 Ves. 125; *Stebbing v. Walkey*, 2 B. C. C. 85; 1 Cox, 250; *Lee v. Pain*, 4 Ha. 249; *Harrison v. Harrison*, 1 R. & M. 72; *Morrison v. Martin*, 5 Ha. 507; *Yeats v. Yeats*, 16 B. 170; see 4 Ch. D. 46; *Lee v. Lee*, 10 Jur. N. S. 1041; *Spencer v. Ward*, 9 Eq. 507; *In re Bassett's Estate*; *Perkins v. Fladgate*, 14 Eq. 54.

The fact that a blank is left for the insertion of the names of the legatees makes no difference. *M'Kechnie v. Vaughan*, 15 Eq. 289.

Evidence  
of inten-  
tion to  
benefit  
certain  
children.

In such cases evidence of intention is not admissible to show that the testator meant certain of the children, or the children of a particular marriage who may correspond in number with the number mentioned in the will. *Daniell v. Daniell*, 3 De G. & S. 337; *Matthews v. Foulshaw*, 12 W. R. 1141.

Thus under a bequest to the two children of my son Joseph, who had four living at the date of the will, two by a first and two by a second marriage, all the children took, and evidence of an intention to benefit the children of the first marriage was not admitted. *Matthews v. Foulshaw*, *supra*.

On the same principle, a gift to the five daughters of A., who has one daughter and five sons, goes to the daughter. *Lord Selsey v. Lord Lake*, 1 B. 151. See *Berkeley v. Pulling*, 1 Russ. 496.

But a gift of 100*l.* a-piece to the four sons of A., who had three sons and a daughter, includes the daughter, the

intention being to give four legacies. *Lane v. Green*, 4 De G. & S. 239.

If there is anything to indicate which of the children the testator meant—for instance, an allusion to their residence—the rule of course does not apply. *Wrightson v. Calvert*, 1 J. & H. 250. See *Hampshire v. Peirce*, 2 Ves. sen. 216.

Explanatory context.

So where the gift was to the three children of W., widow of W., and the widow of W. had, at the date of the will, married again, and there were two children by W., and six by her second marriage then living, it was held that the two children by the first marriage were alone intended to take. *Newman v. Piercey*, 4 Ch. D. 41.

It appears never to have been decided whether, when the number of children living at the date of the will is erroneously stated, children born after the date of the will and before the testator's death would be included.

### C. RULES FOR ASCERTAINING THE CLASS.

It appears to be settled, that the same rules are applicable in the case of realty and personalty for the purpose of fixing the period, when the persons to take under a class name are to be ascertained, though the reasons for the rules in the case of personalty, which it is desirable to distribute as soon as possible, do not apply to realty. 2 Jarm. 144; Williams on Seisin, 208.

Distinction between realty and personalty.

The rules may be stated as follows:—

1. If there is a direct devise of real estate to the children of A., those living at the testator's death take to the exclusion of those born afterwards. *Singleton v. Gilbert*, 1 Cox, 68; 1 B. C. C. 542. See, however, *Fearne*, Cont. Rem. 514, note *l.*; *Dunning*, Conc. Prec. 218, note; *Cook v. Cook*, 2 Vern. 544; *Weld v. Bradbury*, *ib.* 560, and cases

Direct devise to children.

there cited; *Mogg v. Mogg*, 1 Mer. 654; *Eddowes v. Eddowes*, 30 B. 603.

The cases of *Mogg v. Mogg* and *Eddowes v. Eddowes* cannot be said to be direct authorities upon this point, as the devise there was to the children "now born or hereafter to be born."

Direct  
bequest.

It is clear that the rule above stated applies to an immediate bequest of personalty. *Hill v. Chapman*, 1 Ves. J. 405; 3 B. C. C. 391.

Effect of  
gift over.

The class will not be enlarged by a gift over on death of any of the class under twenty-one, nor by a gift over in default of children. *Davidson v. Dallas*, 14 Ves. 576; *Berkeley v. Swinburne*, 16 Sim. 275; *Andrews v. Partington*, 3 B. C. C. 401; *Scott v. Harwood*, 5 Mad. 332; see *Hutcheson v. Jones*, 2 Mad. 124.

No  
children  
at death.

If there are no children at the testator's death there appears to have been some doubt whether in such a case a devise of real estate would not altogether fail. In all probability, however, such a devise would go to all the children born at any time after the testator's death. See *Fearne*, 532; *Shep. Touch.* 438.

This is settled as regards personalty. *Weld v. Bradbury*, 2 Vern. 705; *Shepherd v. Ingram*, Amb. 448; *Hutcheson v. Jones*, 2 Mad. 124; *Harris v. Lloyd*, T. & R. 310.

Contingent  
remainder.

2. A devise of the legal estate to A. for life with remainder to a class of children is governed, in the case of wills not executed, revived, or republished after the 2nd of August, 1877, by the rules of law applicable to contingent remainders; that is to say, only those children can take whose interests become vested before the determination of the life interest. If there are none at that time whose interests have become vested the devise in remainder fails. *Rhodes v. Whitehead*, 2 Dr. & Sm. 532; *Price v. Hall*, 5 Eq. 399; *Percival v. Percival*, 9 Eq. 386; *Brackenbury v. Gibbons*, 2 Ch. D. 417; *Cunliffe v. Brancker*, 3 Ch. D. 393.

Contingent remainders of copyholds were destroyed in the same way by the determination of the particular estate before the remainders become vested. *Lane v. Pannel*, 1 Roll. Rep. 238, 317, 438; *Fearne*, 310, 320; *Scriven on Copyholds*, 5th Ed. 281.

On the other hand, it seems a contingent remainder in an estate *pur autre vie* requires no particular estate to support it. See *Pickersgill v. Grey*, 10 W. R. 207; 31 L. J. Ch. 394.

By 40 & 41 Vict. c. 33, it is enacted:—

40 & 41  
Vict.  
c. 33.

Every contingent remainder created by any instrument executed after the passing of this Act (2nd of August, 1877), or by any will or codicil, revived or republished by any will or codicil executed after that date, in tenements or hereditaments of any tenure, which would have been valid as a springing or shifting use, or executory devise, or other limitation, had it not had a sufficient estate to support it as a contingent remainder, shall, in the event of the particular estate determining before the contingent remainder vests, be capable of taking effect in all respects as if the contingent remainder had originally been created as a springing or shifting use, or executory devise, or other executory limitation.

It has been suggested that this Act does not apply where the remainder has become vested in one member of a class, as in such a case it cannot be said that the particular estate has determined "before the contingent remainder vests." *Williams on Seisin*, pp. 205—208.

If the legal estate is devised to trustees, or is outstanding, for instance in a mortgagee, children born after the determination of the life estate may take a share, but it seems the time at which the class is to be fixed will be determined by the rules applicable to personalty. *In re Eddels' Trusts*, 11 Eq. 559; *Berry v. Berry*, 7 Ch. D. 657; *Astley v. Micklethwait*, 15 Ch. D. 59. See *Dunning, Conc. Prec.* 218, note.

Equitable  
remainder  
in land.

Future  
gifts.

In the case of a gift of personalty in remainder, all children born at the death of the testator and coming into *esse* before the death of the tenant for life, take a share to the exclusion of those born afterwards. *Middleton v. Messenger*, 5 Ves. 136; *Odell v. Crone*, 3 Dow. 61; *Holland v. Wood*, 11 Eq. 91; *Barnaby v. Tassell*, 11 Eq. 363.

If the life interest is determinable on bankruptcy or some other event, the class is fixed at the time of determination, unless the shares are not to be paid till the death of the tenant for life. *Re Smith*, 2 J. & H. 594; *Aylwin's Trusts*, 16 Eq. 585; *Brandon v. Aston*, 2 Y. & C. C. 24, 30.

If no children are born before the death of the tenant for life all after-born children are admitted. *Chapman v. Blissett*, Cas. tem. Talb. 145; *Wyndham v. Wyndham*, 3 B. C. C. 58.

But this rule does not apply, if there is a clear intention, that distribution is to be made once for all when the fund falls into possession. *Godfrey v. Davis*, 6 Ves. 43; explained in *Conduitt v. Soane*, 4 Jur. N. S. 502.

Gift of re-  
versionary  
property.

3. And on the same principle if the interest bequeathed is reversionary, the class remains open till the interest falls into possession. *Walker v. Shore*, 15 Ves. 122; *Harvey v. Stacey*, 1 Dr. 122.

But this does not apply, where a residue is given and some portion of the property which falls into it is reversionary, unless there are provisions indicating an intention to treat the reversionary property separately. *Hill v. Chapman*, 1 Ves. J. 405; 3 B. C. C. 391; *Hagger v. Payne*, 23 B. 474; *Coventry v. Coventry*, 2 Dr. & Sm. 470; *King v. Cullen*, 2 De G. & S. 252.

Gift to be  
paid at  
twenty-  
one.

4. If there is a direct gift "to be paid at twenty-one, or to such as attain twenty-one:"

a. If any member of the class attain twenty-one in the testator's lifetime the class is fixed at the testator's death. *Hagger v. Payne*, 23 B. 474.

A child *en ventre* at the testator's death was held not to be included in *In re Gardiner's Estate*; *Garratt v. Weeks*, 20 Eq. 647, *sed quære*, see *Bortoft v. Wadsworth*, 12 W. R. 523.

b. If none attain twenty-one in the testator's lifetime, all born at the testator's death and coming into existence before the eldest attains twenty-one are admitted. *Hoste v. Pratt*, 3 Ves. 729; *Balm v. Balm*, 3 Sim. 492; *Blease v. Burgh*, 2 B. 221; *Oppenheim v. Henry*, 10 H. 441; *Gillman v. Daunt*, 3 K. & J. 48; *Lock v. Lambe*, 4 Eq. 372; *Gimblett v. Purton*, 12 Eq. 427.

As a rule each child attaining twenty-one is entitled to have his share paid to him, but this is not so if the whole income is given for maintenance and there are children who require maintenance. *Berry v. Briant*, 2 Dr & Sm. 1.

c. It seems doubtful whether, if there are no children at the testator's death, all would be admitted whether born before or after the eldest attains twenty-one. *Armitage v. Williams*, 27 B. 346, better reported in 7 W. R. 650, which seems an authority for the affirmative, was probably decided on the authority of *Mainwaring v. Beevor*, *post*; see *Harris v. Lloyd*, T. & R. 310.

There are the following exceptions to the rule:—

a. If the time fixed for payment would carry the class beyond the limits of perpetuity, members coming into existence after the testator's death, and before the time of payment, will not be admitted. *Kevern v. Williams*, 5 Sim. 171; *quære* as to *Elliott v. Elliott*, 12 Sim. 276.

Exceptions  
to the  
general  
rule.

b. Maintenance out of the shares or presumptive shares of children will not extend the class. *Gimblett v. Purton*, 12 Eq. 427.

Mainten-  
ance out of  
vested and  
presump-  
tive shares.

But if maintenance and advancement are continued beyond the time when the eldest child attains twenty-one, if, for instance, advancement is directed out of vested and

presumptive shares, all children will be let in. *Iredell v. Iredell*, 25 B. 485; *Bateman v. Gray*, 6 Eq. 215.

In *Deffis v. Goldschmidt*, 19 Ves. 566; 1 Mer. 417, where expressions were used showing that the parent could not die leaving a child who would not be entitled to maintenance, all children were included. See *Evans v. Harris*, 5 B. 45.

Distribu-  
tion when  
the young-  
est attains  
twenty-  
one.

c. If distribution is to be made when all attain twenty-one, or when the youngest attains twenty-one, all children will be admitted. *Hughes v. Hughes*, 3 Bro. C. C. 434; 14 Ves. 256; *Mainwaring v. Beevor*, 8 Ha. 44; and perhaps *Armitage v. Williams*, 27 B. 346; 7 W. R. 650.

On the other hand, the class would again be restricted if the distribution is to be made when the youngest for the time being attains twenty-one. *Gooch v. Gooch*, 14 B. 565; 3 D. M. & G. 366.

Gift of  
fixed sum  
to each  
member of  
a class.

d. When the gift is of a particular sum to each member of the class, the class is fixed at the death of the testator, whether possession is postponed to twenty-one or not. *Ringrose v. Bramham*, 2 Cox, 384; *Storrs v. Benbow*, 2 M. & K. 46; 3 D. M. & G. 390; *Butler v. Lowe*, 10 Sim. 317.

And if there are no children then in existence, the gift fails. *Mann v. Thompson*, Kay, 638; *Rogers v. Mutch*, 10 Ch. D. 25.

Gift to  
children  
who attain  
twenty-  
one after  
life in-  
terest.

5. If the gift is to A. for life, then to children who attain twenty-one, the class will be fixed as regards exclusion at the death of A., or when the eldest attains twenty-one, whichever is last. *Clarke v. Clarke*, 8 Sim. 59; *Robley v. Ridings*, 11 Jur. 813; *Beckton v. Barton*, 27 B. 99; 5 Jur. N. S. 349; *Parsons v. Justice*, 34 B. 598; *In re Emmet's Estate*; *Emmet v. Emmet*, 13 Ch. D. 484.

In *Parsons v. Justice* a direction that no child should be excluded in consequence of any other child having attained a vested interest had no effect in extending the class.



6. A child *en ventre* at the time when the class closes is admitted to share, even though the word "living" or "born" be added to the description. *Doe v. Clarke*, 2 H. Bl. 399; *Clarke v. Blake*, 2 B. C. C. 319; *Trower v. Butts*, 1 S. & St. 181. Children *en ventre* when the class closes are admitted.

*Quære* whether *Garratt v. Weekes*, 20 Eq. 647, is consistent with the other authorities.

Similarly, when there is a gift to the children of a tenant for life, a gift over, if at the end of five years she has not had a child, will not take effect if she then has a child *en ventre*. *Pearce v. Carrington*, 8 Ch. 69.

A child *en ventre* is for this purpose supposed to be born at the time of distribution; if, therefore, supposing it to have been then born, it would have been illegitimate, it will not be admitted to take, notwithstanding the marriage of its parents before its birth. *In re Corliss*, 1 Ch. D. 460. Case of child conceived before but born after marriage.

But though a child *en ventre* is looked upon as existing for the purpose of receiving a benefit, it is not looked upon as existing for any other purpose, if, for instance, distribution is to be made when the youngest child for the time being attains twenty-one; the fact that there is a child *en ventre* when the youngest attains twenty-one will not postpone the division. *Blasson v. Blasson*, 2 D. J. & S. 665.

#### D. HOW THE CLASS TO TAKE IN DEFAULT OF APPOINTMENT IS TO BE ASCERTAINED.

When there is a gift to children, as A. may appoint, with no gift in default of appointment, and no appointment is made, similar rules apply as to the period at which the class is to be ascertained. At what time the class to take in default of appointment is to be fixed.

1. A direct gift to children, as A. may appoint, goes apparently to all the children living at the death of the testator, to the exclusion of those born afterwards,

though before the death of A. *Coleman v. Seymour*, 1 Ves. sen. 209.

2. A gift to A. for life, with remainder to his children as he shall appoint, goes to all the children born in the testator's lifetime and coming into being before A's death. *Crone v. Odell*, 1 Ba. & Be. 449; 3 Dow. 68; *Norman v. Norman*, Bea. 430; *Lambert v. Thwaites*, L. R. 2 Eq. 151.

Case when  
the only  
gift is  
through  
the power.

3. If the only gift is through the power, so that the children take by implication only, in default of appointment, the rules are the same.

Thus, where there is a power to A. to dispose of certain property among children, the gift, in default of appointment, goes to those born at the testator's death, to the exclusion of those born subsequently. *Longmore v. Broom*, 7 Ves. 124.

And where the gift is to A. for life, and then to dispose of the capital among his children, all children born before A's death take a share. *Grieveson v. Kirsopp*, 2 Kee. 653.

4. If the donee of the power and the tenant for life are different persons, and the donee dies before the tenant for life, the class is ascertained at the death of the latter. *White's Trusts*, Johns. 656.

And, apparently, if there is anything to show that personal enjoyment by the beneficiaries was intended, those dying before the tenant for life would be excluded. *White's Trusts*, *supra*; *Carthew v. Enraght*, 20 W. R. 743; *In re Phene's Trusts*, 5 Eq. 346.

At what time the class would be ascertained if the donee of the power survives the tenant for life is uncertain; though by analogy to the case of a direct gift it seems it would be ascertained at the death of the tenant for life, and not of the donee of the power.

Power to  
appoint by

5. When there is a direct vested gift to children as A.

shall appoint, the fact that the power is to appoint by deed or will, or by will only, will not affect the class to take in default of appointment. *Casterton v. Sutherland*, 9 Ves. 445; *Falkner v. Lord Wynford*, 15 L. J. Ch. 8; *Lambert v. Thwaites*, L. R. 2 Eq. 151, see *Winn v. Fenwick*, 11 B. 438, there discussed.

6. If the only gift is through the power, only those will take in default of appointment who could have taken under the power; and therefore if the power is to dispose of certain property by will, only those who survive the donee can take in default of appointment. *Walsh v. Wallinger*, 2 R. & M. 78; *Kennedy v. Kingston*, 2 J. & W. 431; *Reid v. Reid*, 25 B. 469; *Freeland v. Pearson*, 3 Eq. 658; *In re Susanni's Trusts*, 47 L. J. Ch. 65; *Sinnott v. Walsh*, 5 L. R. Ir. 27; see *Brown v. Pocock*, 6 Sim. 257, where it does not appear from the report whether the wife survived her husband or not, see L. R. 2 Eq. 157.

#### E. HOW FAR WORDS OF FUTURITY AFFECT THE RULES FOR ASCERTAINING THE CLASS.

Mere words of futurity, as, for instance, a gift to the children that may be born, will not extend the class. *Storrs v. Benbow*, 2 M. & K. 46; 3 D. M. & G. 390; *Townsend v. Early*, 3 D. F. & J. 1.

Where the words are "born or to be born," the rules appear to be—

1. When the gift is after a life estate, such words will not extend the class. *Sprackling v. Rainer*, 1 Dick. 344; *Whitbread v. St. John*, 10 Ves. 152; *Parsons v. Justice*, 34 B. 598.

The case is of course different if the gift is to children "now born or who shall be born in the lifetime of their parents." *Scott v. Lord Scarborough*, 1 B. 154.

2. The rule is the same where the gift is to children

How far words of futurity affect the ordinary rules for fixing the class to take under a gift to children. Children born or to be born.

now born or who may be born hereafter who shall attain twenty-one. *Iredell v. Iredell*, 25 B. 485; *Bateman v. Gray*, 29 B. 447; 6 Eq. 215.

3. In the case of a direct gift of personalty to children, the words "now born or to be born hereafter" would probably be held to be intended to refer to children born between the date of the will and the death. *Dias v. De Livera*, 5 App. C. 123.

In the case, however, of a direct devise of realty under similar words, children born after the testator's death have been included. *Mogg v. Mogg*, 1 Mer. 654; *Gooch v. Gooch*, 14 B. 565; *Eddowes v. Eddowes*, 30 B. 603.

4. If, however, the gift is of a legacy to each of the children begotten or to be begotten, the class will not be extended beyond the testator's death, as not merely the distribution of what the children are to take, but of the whole estate of the testator, would be indefinitely postponed. *Butler v. Lowe*, 10 Sim. 317.

#### F. DISTRIBUTION PER CAPITA AND PER STIRPES.

Whether a gift to the children of several parents to be distributed *per stirpes* or *per capita*. A gift to A. and the children of B. goes *primâ facie* to all *per capita*, and not *per stirpes*. *Dowding v. Smith*, 3 B. 541; *Rickabe v. Garwood*, 8 B. 579.

So, too, a gift to the children of A. and B., or even to class A., and class B. and C., goes *per capita* to all. *Dugdale v. Dugdale*, 11 B. 402; *Dowding v. Smith*, 3 B. 541; *Pattison v. Pattison*, 19 B. 638; *Armitage v. Williams*, 27 B. 346; *Rook v. A.-G.*, 31 B. 313; *Amson v. Harris*, 19 B. 210; *Tyndale v. Wilkinson*, 23 B. 74; *Baker v. Baker*, 6 Ha. 269.

But a gift over of the share of any child dying before attaining a vested interest in possession not to the other members of the class but to the brothers and sisters of the child so dying, will import a stirpital distribution. *Archer*

v. *Legg*, 31 B. 187 ; see, too, *Ayscough v. Savage*, 12 W. R. 373.

Similarly a gift to several and their issue, or to the children and grandchildren of A., goes to all children and grandchildren coming into being before the period of distribution *per capita*. *Barnaby v. Tassell*, 11 Eq. 363 ; *Lea v. Thorp*, 6 W. R. 480 ; 4 Jur. N. S. 447 ; 27 L. J. Ch. 649.

In the same way a gift after a life interest to surviving children and their issue goes to all the children and issue who survive the period of distribution *per capita*. *Re Fox's Will*, 35 B. 163 ; 13 W. R. 1013 ; *Cancellor v. Canceller*, 11 W. R. 16 ; 2 Dr. & Sm. 199. *Shailer v. Groves*, which, as reported in 6 Hare, 162, might be cited in favour of a different construction, is there wrongly reported. See 11 Jur. 485 ; 16 L. J. Ch. 367.

A direction that parents and children are to be classed together, and share in equal proportions, will not import a stirpital distribution. *Turner v. Hudson*, 10 B. 222.

But the word "respective" has a strong stirpital force. *Davis v. Bennett*, 4 D. F. & J. 327 ; *Ayscough v. Savage*, 13 W. R. 373. Effect of the word respective.

As to the word "devolve," see *Stonor v. Curwen*, 5 Sim. 264.

And if the issue of a *stirps* are treated as taking among them only one equal share, the stirpital construction will be adopted. *Brett v. Horton*, 4 B. 239 ; *Hunt v. Dorsett*, 5 D. M. & G. 570.

A gift to several and their issue "*per stirpes*," or a direction that issue are to take only their parents' share, is sufficient to show that the issue were not meant to take in competition with the original takers. *Pearson v. Stephen*, 2 Dow. & Cl. 328 ; 5 Bl. N. S. 203 ; *Johnson v. Cope*, 17 B. 561.

Whether a direction that issue are to take only the In what cases the

Distribution will be stirpital throughout.

The word parent used in a recurring or sliding sense.

share their ancestor would have taken will have the effect of making the distribution stirpital throughout seems not to be settled.

Where the direction is that the issue are to take a parent's share, and the word "parent" is used in a recurring or sliding sense, so as to apply to successive generations of issue, it is clear that the distribution will be stirpital throughout. *Ross v. Ross*, 20 B. 645; *In re Orton's Trust*, 3 Eq. 375; *Palmer v. Cruttwell*, 8 Jur. N. S. 479.

So, too, where the direction is that the children or grandchildren are to take an original share between them. *Powell v. Powell*, 28 L. T. N. S. 730.

But a mere direction that the share of any of the original takers dying is to go to his issue would, it seems, not have the effect of preventing remoter issue from taking that share with issue less remote *per capita* between them. *Birdsall v. York*, 5 Jur. N. S. 1237; *Southam v. Blake*, 2 W. R. 446; *Weldon v. Hoyland*, 4 D. F. & J. 564. *Robinson v. Sykes*, 23 B. 40, which is *contra*, was on a marriage settlement.

Effect of the words *per stirpes*.

If the gift is to several, and their issue *per stirpes*, the stirpital distribution will be carried through throughout, so that no children or remoter issue can take in competition with the parents. *Dick v. Lucy*, 8 B. 214; *Gibson v. Fisher*, 5 Eq. 51.

Gift to parents for life and then to their children.

When the gift is to several for life, and then to their children, the cases are not easily reconcileable.

1. It seems clear that a gift to A. and B., as tenants in common for their lives, and then at their death, or at their deaths, or at the death of A. and B., to their children, goes, upon the death of each tenant for life, to his children. *Flinn v. Jenkins*, 1 Coll. 365; *Tanière v. Pearkes*, 2 S. & St. 383; *Willes v. Douglas*, 10 B. 47; *Arrow v. Mellish*, 1 De G. & S. 355; *Turner v. Whittaker*, 23 B. 196; *Saril*

v. *Saril*, 23 B. 87 ; see, too, *Doe d. Patrick v. Royle*, 13 Q. B. 100 ; *Brown v. Jarvis*, 2 D. F. & J. 168.

If the gift is after the deaths of the tenants for life to their children and grandchildren, the families take *per stirpes*, but the children and grandchildren take *per capita*, *inter se*. *Barnaby v. Tassell*, 11 Eq. 363.

But if the testator goes on to explain what he means by "their children," by adding "that is to say, the children of A. and B.," they take *per capita*. *Abrey v. Newman*, 16 B. 431.

2. If the gift be to A. and B. for their lives, and at their death not to their children but to the children of A. and B., there seems less reason for contending that the children are to take *per stirpes*. Gift to A. and B. for life, then to children of A. and B.

However, in *Wells v. Wells*, 20 Eq. 342, the stirpital construction was adopted. See *Milnes v. Akeel*, 6 W. R. 430 ; *Sutcliffe v. Howard*, 38 L. J. Ch. 472 ; *Re Nott's Trusts*, 20 W. R. 569.

In such a case a superadded direction that, "if there is but one child, the whole is to go to such only child," would afford an argument that the distribution was meant to be *per capita*. *Pearce v. Edmeades*, 3 Y. & C. Ex. 246 ; 2 W. R. 672 ; *Swabey v. Goldie*, 1 Ch. D. 380 ; see, too, *Peacock v. Stockford*, 7 D. M. & G. 129.

3. If the gift to the children is not till after the death of the survivor of the tenants for life, it would seem the distribution will be *per capita* ; at any rate if the gift is to the children of A. and B., and not merely to "their children." Gift to children after death of surviving tenant for life. *Malcolm v. Martin*, 3 Bro. C. C. 50 ; *Pearce v. Edmeades*, 3 Y. & C. Ex. 246 ; *Stevenson v. Gullan*, 18 B. 590 ; *Nockolds v. Locke*, 3 K. & J. 6 ; *Swabey v. Goldie*, 1 Ch. D. 380 ; see *Alt v. Gregory*, 8 D. M. & G. 221. Perhaps *Smith v. Streetfield*, 1 Mer. 358, comes under this head.

If the gift is substitutional, as to several or their children, Substitutional gifts.

the children take *per stirpes*. *Congreve v. Palmer*, 16 B. 435; *Timins v. Stackhouse*, 27 B. 434; *Gowling v. Thompson*, 19 L. T. N. S. 242; *In re Sibley's Trusts*, 5 Ch. D. 494.

A simple gift, however, to several or their issue, though it would import a stirpital distribution among the families, would not prevent all the issue of each family from taking *per capita inter se*. *Gowling v. Thompson*, 19 L. T. N. S. 242; *In re Sibley's Trusts*, 5 Ch. D. 493.

How the  
*stirpes*  
ascertained.

In ascertaining the *stirpes* reference is to be made to the original *stirpes* pointed out by the testator, and not to the *stirpes* existing at his death, so that there will be as many primary shares as there are original *stirpes* who at the testator's death have descendants living. *Gibson v. Fisher*, 5 Eq. 51; see, however, *Robinson v. Shepherd*, 12 W. R. 234; 10 Jur. N. S. 53; 4 D. J. & S. 129.



## CHAPTER XXIV.

## MEANING OF WORDS DESCRIPTIVE OF RELATIONSHIP.

## I. NEPHEWS AND NIECES.

NEPHEWS and nieces mean *primâ facie* the children of brothers and sisters, including those of the half blood. *Falkner v. Butler*, Amb. 514; *Grieves v. Rawley*, 10 Ha. 63; *Cotton v. Scarancke*, 1 Mad. 45.

Nephews  
and nieces  
mean  
*primâ facie*  
children of  
brothers  
and sisters.

The meaning of the word will not be enlarged where the gift is to each of the present nieces of A., who had only one niece of the first degree living at the date of the will. *Crook v. Whitley*, 7 D. M. & G. 490.

The fact that the gift is to "nephews, descendants of my brothers," will not enlarge the class. *Williamson v. Moore*, 10 W. R. 536.

The fact that a great-niece or a wife's niece has been previously called a niece will not enlarge the meaning of the word. *Shelley v. Bryer*, Jac. 207; *Thompson v. Robinson*, 27 B. 486; *Smith v. Liddiard*, 3 K. & J. 252; *Wells v. Wells*, 18 Eq. 504; *Merrill v. Morton*, 43 L. T. N. S. 750; 29 W. R. 394.

Nor will a gift to my great-nephew, and such other of my nephews and nieces as shall be living at my death. *Blower's Trusts*, 11 Eq. 97; 6 Ch. 351.

But if the testator has at the date of his will and death no nephews and nieces of his own, and there are nephews and nieces of his wife, they will take, though he may have had brothers and sisters living at the date of his will. *Hogg v. Cook*, 32 B. 641; *Sherratt v. Mountfield*, 15 Eq. 305; 8 Ch. 928; see *Adney v. Greatrex*, 17 W. R. 637.

In what  
cases a  
wife's  
nephew  
may take.

The words "nephews and nieces on both sides" include a wife's nephew. *Frogley v. Phillips*, 30 B. 168; 3 D. F. & J. 466.

If a great-nephew is referred to as taking a share of a gift to nephews and nieces, the words will be held to include grand-nephews and grand-nieces. *Weeds v. Bristow*, 2 Eq. 333.

And if the testator expressly defines a niece, as "my niece, daughter of my nephew," nephews and nieces will include grand-nephews and grand-nieces. *James v. Smith*, 14 Sim. 214.

A bequest to "male nephews" has been held to include only sons of brothers. *Lucas v. Cuddy*, 1 R. 10 Eq. 514.

## II. COUSINS.

### Cousins.

The word cousins means primarily children of uncles and aunts. *Sanderson v. Bayley*, 4 M. & Cr. 56; *Caldecott v. Harrison*, 9 Sim. 457; *Stoddart v. Nelson*, 6 D. M. & G. 68; *Stevenson v. Abingdon*, 31 B. 305; *Burbey v. Burbey*, 9 Jur. N. S. 96.

### Second cousins.

Second cousins are persons who have the same great-grandfather or great-grandmother, and will not therefore include first cousins once removed. *Corporation of Bridgnorth v. Collins*, 15 Sim. 541; *In re Parker*; *Bentham v. Wilson*, 49 L. J. Ch. 587; 15 Ch. D. 528.

But if there are no second cousins the term will include all within the same degree of relationship, unless there is an intention to exclude first cousins twice removed, for instance, by a substitutionary gift to the children of second cousins who had died. *Slade v. Fooks*, 9 Sim. 386.

### First and second cousins.

In a gift to "first and second cousins," the words will have their strict meaning, unless there is something to show that the testator is not using them in their proper sense. *In re Parker*; *Bentham v. Wilson*, *supra*, where

*Mayott v. Mayott*, 2 B. C. C. 125, is explained, and *Charge v. Goodyer*, 3 Russ. 140; *Silcox v. Bell*, 1 S. & St. 301, are disapproved.

### III. GRANDCHILDREN.

Similarly, grandchildren, unless explained by the con-Grand-  
text, will not include great-grandchildren. *Oxford v. children.*  
*Churchill*, 3 V. & B. 59.

But if the gift is to grandchildren herein named, a great-grandchild who has previously been called grandchild may take. *Hussey v. Berkeley*, 2 Ed. 194.

### IV. ISSUE.

A bequest to issue as purchasers goes to all issue, Issue.  
children, grandchildren, &c., as joint tenants, and all come  
in who are in existence at the time of vesting in posses-  
sion. *Davenport v. Hambury*, 3 Ves. 257; *Maddock v.*  
*Legg*, 25 B. 531; *Weldon v. Hoyland*, 4 D. F. & J. 564;  
*Hobgen v. Neale*, 11 Eq. 48.

And in the case of a devise of realty, all such issue take  
as joint tenants for life, or in fee, according as the will  
dates before or since the Wills Act. *Cook v. Cook*, 2 Vern.  
545; *Mogg v. Mogg*, 1 Mer. 654, 689; *Dalzell v. Welch*,  
2 Sim. 319.

1. In the case of realty, however, this construction will Excep-  
be excluded if there is a general intention manifest to tions.  
keep the estates together in a single line of enjoyment,  
in which case the estates will devolve according to the  
rule in *Mandeville's Case*. *Allgood v. Blake*, L. R. 7 Ex.  
339; *ib.* 8 Ex. 160; and see *Whitelock v. Heddon*, 1 B. &  
P. 243.

2. The generality of the word issue will be restrained In what  
if the testator explains that he meant by issue children. cases issue  
means  
children.

a. This will be the case if the word issue is coupled with

parent: for instance, if, in a substitutional gift to issue, the issue are directed to take their parent's share. *Sibley v. Perry*, 7 Ves. 522; *Pruen v. Osborne*, 11 Sim. 132; *Smith v. Horsfall*, 25 B. 628; *Stevenson v. Abingdon*, 31 B. 305; *Macgregor v. Macgregor*, 1 D. F. & J. 63; *Martin v. Holgate*, L. R. 1 H. L. 175; *Bryden v. Willett*, 7 Eq. 472; *Heasman v. Pearse*, 7 Ch. 275; see, however, *Ralph v. Carrick*, 11 Ch. D. 873.

If, however, the word parent is not used in the sense of the first taker, whose share the issue are to take by substitution, but in what might be called a sliding sense, so as to denote child, grandchild, great-grandchild, and so on, it will not have the effect of cutting down issue to children. See *Ross v. Ross*, 20 B. 645, where the testator distinguished between a parent's share and a child's share, children being the first takers.

Effect of a gift over in default of issue.

The fact that there is a gift over in default of issue of the first takers affords an argument against construing issue as equivalent to children, though it is not in itself conclusive. See cases *supra cit.*; *Re Kavanagh's Will*, 13 Ir. Ch. 120; *Corrie's Will*, 32 B. 426.

Gift over in default of children or issue.

But if the gift over is not merely in default of issue but in default of "children or issue," it would seem that the word issue cannot be restricted, though the issue are directed to take only a parent's share. *Ross v. Ross*, 20 B. 645; *Ralph v. Carrick*, 11 Ch. D. 873, 883.

Issue of issue.

b. Issue of issue must mean issue of children, if not children of children. *Pope v. Pope*, 14 B. 593; *Williams v. Teale*, 6 Ha. 239; *Heasman v. Pearse*, 7 Ch. 275.

So, too, children of issue will mean children of children. *Fairfield v. Bushell*, 32 B. 158.

Issue of the marriage in a settlement.

c. In a marriage settlement limitations in favour of the "issue of the marriage" would probably be confined to children. *In re Dixon's Trusts*, I. R. 4 Eq. 1; *In re*

*Denis's Trusts*, I. R. 10 Eq. 81; see *Donoghue v. Brooke*, I. R. 9 Eq. 489.

As to the meaning of legal issue by marriage in a will, see *Reed v. Braithwaite*, 11 Eq. 514.

The words issue lawfully begotten of a person will not confine issue to children. *Hayden v. Willshire*, 3 T. R. 372; *Evans v. Jones*, 2 Coll. 516. Issue lawfully begotten.

d. If after a gift to issue the testator adds, "and if but one then to such only child," issue will mean children. *In re Hopkins' Trusts*, 9 Ch. D. 131; *In re Biron*, 1 L. R. Ir. 258; see *Carter v. Bental*, 2 B. 551; *In re Meade's Trusts*, 7 L. R. Ir. 51.

e. The fact that in one bequest after a gift for life the remainder is given to children, while in another gift in a later part of the will to the same tenants for life the remainder is given to issue, will not restrict the meaning of issue in the second gift. *Waldon v. Boulter*, 22 B. 284. One remainder to children, another to issue.

The fact that in one part of the will there is an explanatory context showing that the testator has used issue as equivalent to children will not be sufficient to give the word a restricted meaning in another part of the will where there is no explanatory context. *Head v. Randall*, 2 Y. & C. C. 231; see *Hedges v. Harpur*, 9 B. 479; *Re Corrie's Will*, 32 B. 426. Issue may have different meanings in different gifts.

But where in successive limitations of the same property to tenants for life and then to issue the word is in one case explained to mean children, it may have the same meaning in the other limitations. *Foster v. Wybrants*, I. R. 11 Eq. 40. Successive limitations of same property.

And if the testator has frequently used the word issue as equivalent to children, it will have that meaning in a limitation where there is no context to confine it. *Ridgeway v. Munkittrick*, 2 Dr. & War. 84; *Rhodes v. Rhodes*, 27 B. 413; *In re Harrison's Estate*, 3 L. R. Ir. 114.

Explanatory reference.

The testator may explain what he meant by issue, for instance, by referring to a gift in favour of issue as being a gift in favour of children. *Macgregor v. Macgregor*, 1 D. F. & J. 63; *Baker v. Bayldon*, 31 B. 209.

At what time the class of issue is to be ascertained in a substitutional gift.

When the gift to issue is substitutional, the class of issue is not to be ascertained once for all at the death of the parent, but it will include persons subsequently born before the period of distribution. *In re Sibley's Trusts*, 5 Ch. D. 494; *In re Jones's Estate*; *Hume v. Lloyd*, 47 L. J. Ch. 775; overruling *Hobgen v. Neale*, 11 Eq. 48.

In the case of a gift in remainder to issue the same rule applies; that is to say, all the issue born at the testator's death and coming into being before the death of the tenant for life are admitted. *Surridge v. Clarkson*, 14 W. R. 979.

In the case of cross-remainders.

If the gift is to several for life, and then to their issue, with cross-remainders between them, the class of issue to take under the cross-remainders is fixed once for all at the death of the parent, who is tenant for life, and not at the death of the tenant for life dying without issue. *In re Ridge's Trusts*, 7 Ch. 665.

## V. DESCENDANTS.

Descendants.

Descendants means *prima facie* all descendants living at the time of distribution, and apparently they take *per capita*. *Crossley v. Clare*, Amb. 397; 3 Sw. 320; *Butler v. Stratton*, 3 B. C. C. 367.

But the expression "descendants or representatives" imports a distribution *per stirpes*. *Rowland v. Gorsuch*, 2 Cox, 187.

The word descendants requires a stronger explanatory context to confine it to children than the word issue. For instance, a direction that descendants are to take a parent's

would not limit the class to children. *Ralph v. Clark*, 11 Ch. D. 873.

would seem that the term descendants, when used as a word of purchase, and coupled with a gift to the ancestor, in a substitutional and representative sense, so that in a class consisting of several and their descendants, descendants would be in competition with their ancestor. *Tucker v. Tucker*, 2 Jur. N. S. 483; and perhaps *Jones v. Price*, 155, may be supported on this principle. See, too, *Pepper*, 27 B. 86; *Best v. Stonehewer*, 34 B. 66; *Re S.* 537.

Power to appoint to descendants does not authorize appointment to the legal personal representative of a person, though he may happen also to be a descendant. *Re Gwynne's Trust*, 26 W. R. 93; 47 L. J. Ch. 65.

## VI. RELATIONS.

The words nearest relations explain themselves, and no reference to the statute is necessary to determine the persons to take. *Smith v. Campbell*, 19 Ves. 400; *Brandon v. Brandon*, 3 Sw. 312. See *Goodinge v. Goodinge*, 1 Ves. sen. 231; *Edge v. Salisbury*, Amb. 70.

Nearest relations means next of kin.

But the terms relations or near relations or friends and Relations. relations are of indefinite meaning, and the Courts, when compelled to determine the persons to take, have restricted them to relations capable of taking within the Statutes of Distribution, both as regards realty and personalty. *Whitehorne v. Harris*, 2 Ves. sen. 527; *Walter v. Maunde*, 19 Ves. 424; *Thwaites v. Over*, 1 Taunt. 263; *Salisbury v. Denton*, 3 K. & J. 529; *Re Caplin's Will*, 2 Dr. & Sm. 527; 34 L. J. Ch. 578.

The persons pointed out by the statute take *per capita* as joint tenants, and not in the proportions fixed by the

statute. *Tiffin v. Longman*, 15 B. 275; *Eagles v. Le Breton*, 15 Eq. 148.

But they take in the proportion directed by the statute where the gift is to relations, share and share alike, as the law directs. *Fielden v. Ashworth*, 20 Eq. 410.

Power to select.

A power to select relations extends to relations generally. *Harding v. Glyn*, 1 Atk. 469; 5 Ves. 501.

But a power to distribute does not, and in default of appointment the Court will restrict the relations to those who can take under the statute. *Pope v. Whitcombe*, 3 Mer. 689; *Grant v. Lynam*, 4 Russ. 292; *Re Caplin's Will*, 2 Dr. & Sm. 527; *Lawlor v. Henderson*, I. R. 10 Eq. 150.

Of course the testator may, by explanatory words, extend the word relations to persons not within the statute. *Devisme v. Mellish*, 5 Ves. 529; *Hibbert v. Hibbert*, 15 Eq. 372. See *Bennett v. Honeywood*, Amb. 708.

When the class to take under a gift to relations is to be ascertained.

*Prima facie* the class of relations to take is to be ascertained at the death of the propositus.

Therefore, where the gift is immediate or in remainder to the testator's relations, after gifts to persons who are some of the next of kin, his next of kin at his death alone take. *Rayner v. Mowbray*, 3 B. C. C. 234; *Masters v. Hooper*, 4 B. C. C. 207; *Pearce v. Vincent*, 1 Cr. & M. 598; 2 M. & K. 800; 2 Sc. 347; 2 Bing. N. C. 328; 2 Kee. 230; see *Eagles v. Le Breton*, 15 Eq. 148, where there is a discrepancy between the head note and the judgment. See *Stert v. Platel*, 5 Bing. N. C. 434.

Gift to such relations as survive the tenant for life.

If the gift is to such relations as survive the tenant for life the class is ascertained at the death of the ancestor, while those who die before the tenant for life are excluded. *Bishop v. Cappel*, 1 De G. & S. 411.

Where the tenant for life is sole next of kin at the date

The term relations, however, has not the same direct reference to the death of the propositus as heirs or next of kin, and therefore where there is a gift to A. either for



life with remainder to her children, or to A. absolutely, followed by a gift over, if A. dies without issue, to the testator's relations, and A. is the sole next of kin at the date of the will and death, the class will be ascertained at A's death. *Marsh v. Marsh*, 1 B. C. C. 293; *Jones v. Colbeck*, 8 Ves. 38; *Lees v. Massey*, 3 D. F. & J. 113; see *post*, p. 280, *seq.*

And the testator may himself fix the time at which his relations are to be ascertained; for instance, by directing his relations to be advertised for at the death of a tenant for life, and giving the property to such of them as claim within two months after such advertisements. *Tiffin v. Longman*, 15 B. 275.

Where there is a power to appoint to relations and no gift in default of appointment:

1. If there is no life interest, and the power is a general power to appoint to the testator's relations, it seems the class to take will be ascertained at the death of the testator and not when the power expires. *Cole v. Wade*, 16 Ves. 27; in which case, however, the actual point did not arise, since the next of kin at the testator's death, and the time when the power expired, were the same.

2. If there is a life interest and the tenant for life has power to appoint to the testator's or his own relations, the class is to be ascertained at the death of the tenant for life, whether the power is to appoint by deed or will. *Harding v. Glyn*, 1 Atk. 468; *Birch v. Wade*, 3 V. & B. 198; see, too, in *Brown v. Higgs*, 8 Ves. 561.

And it makes no difference whether the power is one of selection or distribution merely: *Pope v. Whitcombe*, 3 Mer. 689, as corrected by Lord St. Leonards on Powers, 662, and *Finch v. Hollingsworth*, 21 Beav. 112; *Caplin's Will*, 2 Dr. & Sm. 527; see, too, *A.-G. v. Doyley*, 4 Vin. Ab. 485, where the tenant for life and the donee of the

When the class to take in default of appointment is to be ascertained.

power were different persons, and the class was ascertained at the death of the tenant for life.

## VII. FAMILY.

**Family.** The word family may have a different meaning, according to the context.

1. In the case of devises of land :—

**Devise of lands.** "If land be devised to a stock or family or house it shall be understood of the heir principal of the house." *Counden v. Clarke*, Hob. 33.

This will be the case where the word is used as a quasi-word of limitation, where, for instance, after a devise to a person, there is a direction that the property is to remain in his family. *Chapman's Case*, Dyer, 333; *Doe d. Chataway v. Smith*, 5 Mau. & S. 126; *Griffiths v. Evan*, 5 B. 241.

A devise to A. and his family according to seniority, gives A. an estate tail. *Lucas v. Goldsmid*, 29 B. 657.

So too a devise of land to A. for life "in confidence that after her decease she will devise the property to my family," goes to the testator's heir-at-law upon A.'s death. *Wright v. Atkyns*, 17 Ves. 255; 19 Ves. 299.

**Direction to secure for family.** Under a direction to secure property for the benefit of a person and his family the realty will be settled for life with successive remainders in tail, and the personalty will be settled for life with remainder to the children. *White v. Briggs*, 15 Sim. 17; 2 Ph. 583; *Woolmore v. Burrowes*, 1 Sim. 512.

**Bequest of personalty to family.** 2. It is now settled that in a bequest of personalty or a mixed bequest of realty and personalty to the family of a person, the primary meaning of family is children. *Barnes v. Patch*, 8 Ves. 604; *Terry's Will*, 19 B. 580; *Wood v. Wood*, 3 Ha. 65; *Parkinson's Trust*, 1 Sim. N. S. 242; *Beales v. Crisford*, 13 Sim. 592; *Burt v. Hillyar*, 14 Eq. 160; *Pigg v. Clarke*, 3 Ch. D. 672; *In re Hutchinson*

& *Tenant*, 8 Ch. D. 540; see *Woods v. Woods*, 1 M. & Cr. 401.

It has been held that the word includes an illegitimate son. *Lambe v. Eames*, 10 Eq. 267; 6 Ch. 597; *Humble v. Bowman*, 47 L. J. Ch. 62.

3. In order to give the word a different meaning there must be some special circumstances.

a. Thus, if there are no children, next of kin may take. *May mean next of kin.*  
*Re Maxton*, 4 Jur. N. S. 407.

b. So a gift to the family of an unmarried person would probably extend to all her relatives. *Snow v. Teed*, 9 Eq. 622.

c. In some cases on the context family has been held to mean those of a man's household, thus including a wife or husband. *Macleroth v. Bacon*, 5 Ves. 158; *Blackwall v. Bull*, 1 Kee. 176. *In the widest sense it may include a husband or wife.*

d. Family has been held to include all descendants in existence at the period of distribution; but such a construction would not be adopted without a strong context. *When it includes all descendants.*  
*Williams v. Williams*, 1 Sim. N. S. 358.

e. It would seem that a power to appoint to a person's family would be limited to his children if there are any. *Power to appoint to family.*  
*In re Hutchinson & Tenant*, 8 Ch. D. 540; see *Sinnott v. Walsh*, 5 L. R. Ir. 27.

If there are no children the donee of the power may select relations not within the degree of next-of-kin. *Grant v. Lynam*, 4 Russ. 292.

If the power is not exercised the statutory next-of-kin are entitled. *Cruwys v. Colman*, 9 Ves. 319.

4. Where it is clear that the testator has used the word family in a wider sense than any of those here mentioned, but it is uncertain who were meant to be included, the gift will be void for uncertainty. *Yeap Cheah Neo v. Ong Cheng Neo*, L. R. 6 P. C. 381; see *Robinson v. Waddelow*, 8 Sim. 134.

Whether a gift to several families goes *per capita* or *per stirpes* among them.

When family is construed children, a simple gift to the families of A. and B. goes *per capita* in joint tenancy. *Gregory v. Smith*, 9 Ha. 708.

So, too, a gift to be divided between the families of A. and B. goes to all the children of A. and B. *per capita* as tenants in common. *Barnes v. Patch*, 8 Ves. 604; see, however, *Alexander v. Douglas*, Rom. Notes of Cases, 93.

Friends.

Under a direction that after the death of the testator's wife, to whom a life interest in lands was given, the lands should revert to the testator's friends, the heir at law was held entitled. *Coogan v. Hayden*, 4 L. R. Ir. 585.

## CHAPTER XXV.

GIFTS TO HEIRS, NEXT OF KIN, REPRESENTATIVES,  
AND EXECUTORS.

WHERE Borough English or gavelkind lands are devised with other lands to the testator's heir, the common law heir is entitled. *Davis v. Kirk*, 2 K. & J. 391; *Thorp v. Owen*, 2 Sm. & G. 90; *Buchanan v. Harrison*, 1 J. & H. 662; *Sladen v. Sladen*, 2 J. & H. 369. Devise of Borough English and Gavelkinds to the heir.

So where Borough English lands alone are devised to a person for life, with remainder to her sons and daughters and their heirs, and if A. dies without having such heirs, to the testator's sons and daughters then living and the heirs of those who may be deceased, the common law heir takes under the ultimate gift. *Polley v. Polley*, 31 B. 363.

In the same way a devise of gavelkind lands alone to the testator's right heirs goes to the common law heir. *Garland v. Beverley*, 9 Ch. D. 213.

The rule is that "*nemo est hæres viventis*," and therefore a devise to the heirs of a living person is contingent, unless the term heirs is so qualified by express words or by the general intention of the will as to show that the testator meant by heir the heir apparent or presumptive or some other person, who will then take as *persona designata*. In what cases the word heir refers to a *persona designata*.

This will be the case if the testator speaks of the heirs of the body of B. now living. *Burchett v. Durdant*, 2 Vent. 311; Carth. 154; see *Chambers v. Taylor*, 2 M. & Cr. 376.

Or the intention of the testator to use the term as designating a person may be gathered from the whole will; if, for instance, the so-called heir is directed to pay annuities to certain persons during whose life he cannot be strictly heir. *Darbison d. Long v. Beaumont*, 1 P. Wms. 229; 3 B. P. C. 60; *Goodright v. White*, 2 W. Bl. 1010; *Winter v. Perratt*, 9 Cl. & F. 606.

A devise to the heirs and assigns of "A., as if she had continued sole and unmarried," is a gift to the person filling the character as *persona designata*. *Brookman v. Smith*, L. R. 6 Ex. 291; *ib.* 7 Ex. 271; *Dormer v. Phillips*, 4 D. M. & G. 855; 3 Dr. 39; *Fearne*, C. R. 209—212.

Acknowledgment of a person as heir.

The appointment or acknowledgment of a person as heir, though he may not be the real heir, is sufficient to carry to him the testator's real estate. *Parker v. Nickson*, 1 D. J. & S. 177; 11 W. R. 533; 32 L. J. Ch. 397.

Devise to the heir of a particular name or to heirs male.

A devise to the right heirs male, or to the right heirs of a particular name, will go only to the very heir, who must be a male or of that name. *Ashenhurst's Case*, Hob. 34; *cit.* *Counden v. Clarke*, Moore, 860, pl. 1181; Hob. 29; *Wrightson v. Macaulay*, 14 M. & W. 214; *Thorpe v. Thorpe*, 32 L. J. Ex. 79; see Co. Lit. 24b, note by Hargrave.

If the devise is to the right heirs exclusive of A., who is the right heir, the devise fails. *Goodtitle d. Bailey v. Pugh*, *Fearne*, Cont. Rem. 573; 2 Mer. 348.

Heirs of the body.

The rule does not, however, apply to heirs of the body, whether taking by descent or purchase. *Wells v. Palmer*, 5 Burr. 2617; 2 W. Bl. 687; *Evans d. Weston v. Burtonshaw*, Co. Lit. 164a, n. (2).

Whether the heir male taking by purchase must trace his descent through males.

An heir male taking by inheritance must trace his descent entirely through males. Co. Lit. 25a.

It is said by Jarman, ii. p. 61, that this does not apply to a gift to the heir male or female by purchase, citing Hob. 31; Co. Lit. 25b. At any rate it is clear that if the

word lineal be added the heir must trace his descent through males. *Oddie v. Woodford*, 3 M. & Cr. 584; *Bernal v. Bernal*, 3 M. & Cr. 559; and see *Doe d. Angell v. Angell*, 3 Q. B. 328; *Thellusson v. Rendlesham*, 7 H. L. 429.

It appears, however, to be concluded by authority that, even in the absence of the word lineal, the heir male taking by purchase must claim through males. *Lywood v. Kimber*, 29 B. 38. See *per* Lord St. Leonards, 7 H. L. 512; and see *Doe d. Winter v. Perratt*, 3 M. & Sc. 594.

Under a devise to the heir *ex parte maternâ* a person who is also heir *ex parte paternâ* may take. *Rawlinson v. Wass*, 9 Ha. 673; *In re Willomier's Trusts*, 16 Ir. Ch. 389. Heir *ex parte maternâ*.

#### RULE IN MANDEVILLE'S CASE, CO. LIT. 26B.;

FEARNE, 80.

"Where an estate is limited to the heirs special of a particular ancestor, without any estate of freehold limited to the ancestor (either expressly or by implication), it is impossible to effectuate the expressed will of the donor and to make the estate pass through the whole series of the special heirs designated, except by regarding the limitation as if it were an estate tail, which had originally vested in and descended from the ancestor himself, and yet the first taker must take as purchaser, because no estate did in fact vest in or descend from the ancestor." *Vernon v. Wright*, 2 Drew. 439; 7 H. L. 35. Rule in Mandeville's case.

The result is the creation of a *quasi* entail, partaking of the opposite qualities of purchase and descent. Thus, where the limitation was to Roberge and the heirs of the body of her late husband John de Mandeville by her, where John de Mandeville had left a son and daughter, it was held that the daughter took on the death of the son

*per formam doni*, as the person, who would have been entitled, if the estate had descended from the ancestor. *Mandeville's Case*, Co. Lit. 26 b.

The rule in *Mandeville's case* applies equally where the limitation is to the heirs of the body of the testator. *Allgood v. Blake*, L. R. 7 Ex. 339; *ib.* 8 Ex. 160.

It has been adopted where the term issue was used. *Whitelock v. Heddon*, 1 B. & P. 243.

But it will not be extended to a devise to the heirs of the body of a deceased person, excluding certain lines of descent, which would comprehend the real heirs of the body; nor does it apply to a devise to the right heirs male of a person, though a devise to A. and his heirs male gives A. an estate tail. *Allgood v. Blake*, *supra*; *Ashenhurst's Case*, Hob. 34; *Baker v. Wall*, 1 Ld. Raym. 185; *Doe d. Lindsey v. Colyear*, 11 East, 548.

In what  
cases heirs  
of the body  
means  
children.

Heirs of the body, however, used as a term of purchase, may mean children if the devise is to them as their parent shall appoint, or if they are to take equally among them as tenants in common: *Jordan v. Adams*, 9 C. B. N. S. 483; *Right v. Creber*, 5 B. & Cr. 866; in which case the estate of the ancestor being equitable did not coalesce with the limitation to the heirs.

#### ASSIGNS.

Assigns.

As a rule the words "and assigns," following the word heirs, have no operation, "they have no conveyancing virtue at all, but are merely declaratory of that power of alienation which the purchaser would have had without them." Wms. R. P. 141; *Brookman v. Smith*, L. R. 6 Ex. 291.

It has, however, been held, that a legal limitation to the heirs and assigns of a person, who had a prior equitable life estate, gave that person a general power of appointment over the property. *Quested v. Michell*, 24 L. J. Ch.



722. See, too, *Tapner v. Marlott*, Willes, 177; and *A.-G. v. Vigor*, 8 Ves. 256, 291; but it is unlikely that this construction will be extended.

The effect, however, of a gift to A. or his heirs or assigns, is to give the absolute interest to A. *Wilton's Estate*, 8 D. M. & G. 173; *Hopkins' Trust*, 2 H. & M. 411. See *post*, p. 286.

### BEQUESTS OF PERSONALTY TO HEIRS.

1. A bequest of personalty to the right heirs, or to the heirs at law, or the next heir of an individual, *primâ facie* goes to such heir as *persona designata*, whether the bequest be to the heirs of the testator or of a stranger. *Mounsey v. Blamire*, 4 Russ. 384; *Hamilton v. Mills*, 29 B. 193; *De Beauvoir v. De Beauvoir*, 3 H. L. 524; *Re Rootes*, 1 Dr. & Sm. 228; *Southgate v. Clinch*, 27 L. J. Ch. 651; 4 Jur. N. S. 428.

The rule applies, *a fortiori*, to a mixed fund. *De Beauvoir v. De Beauvoir*, 3 H. L. 524; *Boydell v. Golightly*, 14 Sim. 327; *Todhunter v. Thompson*, 26 W. R. 883.

2. In the same way, if the gift is to A. for life with remainder to his heirs, the heir, in the strict sense, is entitled. *In bonis Dixon*, 4 P. D. 81; *Smith v. Butcher*, 10 Ch. D. 113; disapproving *Mounsey v. Blamire*, 4 Russ. 384. The cases of *Evans v. Salt*, 6 B. 266; *Low v. Smith*, 25 L. J. Ch. 503; 2 Jur. N. S. 344; *Re Peppitt's Estate*; *Chester v. Phillips*, 36 L. T. N. S. 500, must be considered overruled, unless they can be supported on the special context in each case.

3. But the word heirs may be controlled by the context, as in *Gambos's Trust*, 4 K. & J. 757, where a bequest to "the heirs of my late partner for losses sustained during the time that the business of the house was under my sole control," went to the next of kin under the Statute;

*Gift of personalty to T.H.S. & R.F. share & share alike & at the death of T.H.S. & R.F. their eleven share & share alike and their heirs for ever - T.H.S. died without issue - Held upon the death of R.F. the property was dividable in severalty between the eleven of R.F. & the representatives of T.H.S. Hutchinson's Trust 1603.*

and in *In re Newton's Trusts*, 4 Eq. 171, where the bequest to "the heirs and assigns of my deceased sister" was shown to be *quasi* substitutional by other limitations to the testator's living brothers and sisters and their heirs and assigns; and see *In re Steevens' Trusts*, 15 Eq. 110, as to which case *quære*.

Where the intention is to give A. the absolute interest, the word heirs has been held equivalent to executors and administrators. *Powell v. Boggis*, 35 B. 535, where the gift was to A. for life, then to her heirs as she shall give it by will, and if she dies without a will to her right heirs.

And, where the testator directs a division amongst the several heirs of tenants for life, who are related to each other, so that heirs cannot mean next of kin, heirs will mean children. *Bull v. Comberbach*, 25 B. 540; see *Roberts v. Edwards*, 33 B. 259.

Substitutional gift to heirs.

4. In a gift to A. or his heirs, heirs means the persons entitled under the statute. *Vaux v. Henderson*, 1 J. & W. 388; *Gittings v. McDermott*, 2 M. & K. 69; *Jacobs v. Jacobs*, 16 B. 557; *Doody v. Higgins*, 9 Ha. App. 32; 2 K. & J. 729; *In re Craven*, 23 B. 333; *Powell v. Boggis*, 35 B. 535; *Parsons v. Parsons*, 8 Eq. 260; *Neilson v. Monro*, 27 W. R. 936.

If real and personal estate are given together to persons or their heirs, but the realty is not converted, the realty goes to the heir and the personalty to the statutory next of kin. *Wingfield v. Wingfield*, 9 Ch. D. 658. *Healy v. Boulton* 1893

In a bequest to children or their heirs, followed by a gift over, if all the children die without issue the word heirs has been held to mean issue. *Speakman v. Speakman*, 8 Ha. 180; and see *Roberts v. Edwards*, 12 W. R. 33.

Heirs of the body.

In a bequest to A. or the heirs of his body, heirs of the body means such of the persons entitled under the statute as may be descendants of A. *Pattenden v. Hobson*, 17 Jur. 406; 22 L. J. Ch. 697.

A widow is included in the persons entitled under the statute, and the statute fixes not only the persons but the proportions in which they take. *In re Steevens' Trusts*, 15 Eq. 110; *Jacobs v. Jacobs*, *supra*; *Doody v. Higgins*, *supra*. The statute fixes the proportions as well as the persons.

A bequest of personalty to "the heirs or next of kin of A." has been construed as a gift to next of kin. *In re Thompson's Trusts*, 9 Ch. D. 607; see p. 277.

# NEXT OF KIN.

The words next of kin, without more, mean the nearest blood relations of the propositus in an ascending and descending line, and they take as joint tenants. *Withy v. Mangles*, 10 Cl. & F. 215; *Lucas v. Brandreth*, 28 B. 274; *Avison v. Simpson*, Johns. 43; *Halton v. Foster*, L. R. 3 Ch. 505. Gifts to next of kin.

The same meaning has been given to the words "legal or next of kin." *Harris v. Newton*, 46 L. J. Ch. 268; 25 W. R. 228.

Those of the half blood are equally entitled with those of the whole blood. *Collingwood v. Pace*, 1 Vent. 424; *Brown v. Wood*, Alleyn, 36; see Williams on Executors, 1120.

But a selective power to appoint to next of kin will authorise an appointment to statutory next of kin. *Snow v. Teed*, 9 Eq. 622. Gift under power.

Under a gift to next of kin *ex parte maternâ*, next of kin *ex parte paternâ*, who happen to be also next of kin *ex parte maternâ*, will not be excluded, except by express words. *Gundry v. Pinniger*, 14 B. 94; 1 D. M. & G. 502; *Say v. Creed*, 5 Ha. 580. Next of kin ex parte maternâ.

If there is an express reference to the statute or intestacy, all kindred entitled under the statute, including those who take by representation under the statute, will

The effect of a reference to the statute or intestacy.

come in. *Bullock v. Downes*, 9 H. L. 1; *Nichols v. Haviland*, 1 K. & J. 504.

Neither the wife nor the husband take as *next of kin* under the statute. *Garrick v Lord Camden*, 14 Ves. 372; *Kilner v. Leech*, 10 B. 362.

And a gift to persons, entitled as next of kin or otherwise under the statute, will not include the husband. *Milne v. Gilbert*, 2 D. M. & G. 715; 5 D. M. & G. 510.

If a husband has been expressly excluded in a gift to next of kin under the statute, a widow will be admitted under a subsequent gift to next of kin by statute where there is no such exclusion. *In re Collins' Trusts*, W. N. 1877, 87.

If only an intention is declared of leaving property to next of kin according to the statute, which is not carried out, the property goes as in an intestacy, and a widow would therefore be admitted. *Ash v. Ash*, 33 B. 187.

What will exclude one of the next of kin from a gift to next of kin.

A person is not excluded from taking property under a gift to next of kin by the fact, that a life interest in the property is expressly given to him. *Gorbell v. Davison*, 18 B. 556.

But if the gift is to the "other the next of kin," one of the next of kin to whom an interest is expressly given by the will will be excluded. *Cooper v. Dennison*, 13 Sim. 290.

Whether the statute regulates the nature of the interest as well as the persons to take.

If there is a reference to the statute, the statute regulates the nature of the interest, as well as the persons, who are to take under it. *Bullock v. Downes*, 9 H. L. 1; *Ranking's Settlement Trusts*, 6 Eq. 601.

The above proposition seems to be justified by the opinions expressed in *Bullock v. Downes*, and would probably be now adopted. However, the cases go to this:

1. Where there is a reference to intestacy, as well as to the statute, the statute fixes the proportions as well as the persons. *Bullock v. Downes*, *supra*; *Martin v. Glover*, 1 Coll. 270; *Jenkins v. Gower*, 2 Coll. 537.

2. So, where the gift is to persons "entitled under," or "under and according to" the statute. *Horn v. Coleman*, 1 Sm. & G. 169; *Ranking's Settlement*, *supra*.

3. If the gift is merely to persons according to the statute, the better opinion seems to be, that the same result would follow. *Mattison v. Tanfield*, 3 B. 131; *Lewis v. Morris*, 19 B. 34. On the other hand the contrary was held in *In re Greenwood's Trusts*, 3 Giff. 390.

4. Words importing or directing a tenancy in common will not prevent the statute from fixing the proportions. *Mattison v. Tanfield*, *supra*; *Lewis v. Morris*, *supra*. *Richardson v. Richardson*, 14 Sim. 526, must be considered overruled; see *Bullock v. Downes*.

5. It would seem, that a gift *equally* among the persons entitled under the statute, would prevent the statute from fixing the proportions; see *Phillips v. Garth*, 3 B. C. C. 69.

But if there are words importing that the distribution is to be according to the statute, the word *equally* will be rejected. *Holloway v. Radcliffe*, 23 B. 163; see *Fielden v. Ashworth*, 20 Eq. 410.

A devise of land to the nearest of kin by way of heirship goes to the heir. *Williams v. Ashton*, 1 J. & H. 115. Nearest of kin by way of heirship.

A gift to "next of kin or heir at law" would probably go according to the nature of the property. *Lowndes v. Stone*, 4 Ves. 649; see *In re Thompson's Trusts*, 9 Ch. D. 607.

In *Boys v. Bradley*, 10 Ha. 389; 4 D. M. & G. 58; 5 H. L. 873, "next of kin in the male line in preference to the female line," was held to mean next of kin *ex parte paternâ*. Next of kin in the male line.

A devise of land to the "next" or "nearest" of a particular class of relations goes to the eldest of the class. Devise to "nearest" of a class. *Perriman v. Pearce*, Co. Lit. 10b., n. 2; *Power v. Quealy*, 2 L. R. Ir. 227; 4 *ib.* 20, where the devise was to the "nearest, and most deserving male cousin, and a regular Power of the family."

On the other hand, in a gift of real and personal estate together to the nearest relation of a particular name the word relation has been held to be *nomen collectivum*, and to include all the relations of the same degree. *Pyot v. Pyot*, 1 Ves. sen. 335; Belt. 169.

Next of  
kin of a  
particular  
name.

It appears to be clear that a devise of land to "next of kin of a particular name" goes only to next of kin who are by birth entitled to the name, and that a daughter of that name who at the testator's death has changed her name by marriage would be excluded. *Leigh v. Leigh*, 15 Ves. 100; *Jobson's Case*, Cro. El. 576; see *Bon v. Smith*, Cro. El. 532.

Possibly, in the case of personalty or of real and personal estate given together, a reference to a particular name may be more readily understood as referring to the stock or family.

At any rate it may be so understood if there is an explanatory context.

Thus, "nearest relation of the name of the Pyots" has been held to refer to the stock of the Pyots, so that change of name by marriage was immaterial. *Pyot v. Pyot*, 1 Ves. sen. 335.

A similar construction was put upon "next of kin of the surname of Crump." *Carpenter v. Bott*, 15 Sim. 606; see, too, *Mortimer v. Hartley*, 6 Ex. 47.

Whether the person, who is to take under the description of a particular name, must satisfy both parts of the description is uncertain: see *Doe v. Plumptre*, 3 B. & Ald. 474, and the remarks of the Vice-Chancellor on that case in *Carpenter v. Bott*, 15 Sim. 606.

Gift to  
next of kin  
exclusive  
of A., who  
is sole next  
of kin.

A gift to next of kin, to be ascertained at a particular time exclusive of A., who is the sole next of kin, goes to the persons who would have been next of kin if A. also had been dead. *White v. Springett*, 4 Ch. 300.

The case would, however, be different, if the gift were

not to an artificial class of next of kin to be ascertained at a particular time, but to next of kin by statute simply exclusive of A., who happens to be sole next of kin by statute. See *Fearne Posth.* 195.

Under a limitation to the statutory next of kin of B., exclusive of A. and his representatives, it was held that the daughters of A., who were among the statutory next of kin of B. as representing A., were excluded. *Lindsay v. Ellicott*, 46 L. J. Ch. 878.

The testator may show, that he meant by next of kin the children of a tenant for life, as, where the gift was to a daughter for life and then to the testatrix's next of kin, to be vested interests from the testatrix's death, "except as to any child afterwards born of the daughter." *Bird v. Wood*, 2 S. & St. 400; see 2 M. & K. 86, 89.

In a gift to the next of kin of A., or even, to the person entitled under the Statutes of Distribution, as if she had died intestate and unmarried, unmarried will be construed as equivalent to "without leaving a husband," since otherwise children would be excluded. *Day v. Barnard*, 1 Dr. & S. 351; *Sanders' Trusts*, 3 K. & J. 152; *Norman's Trusts*, 3 D. M. & G. 965; *Maugham v. Vincent*, 9 L. J. Ch. 329; *Clarke v. Colls*, 9 H. L. 601.

Where the testator, a widower, expressly excluded a granddaughter from a bequest in favour of his "next of kin as if he had died unmarried," it was held that unmarried meant wifeless. *Carveth v. Heiron*, W.N.1879,145.

In a marriage settlement a limitation in favour of the next of kin of the wife as if she had died "without having been married," when there was a declaration that a named illegitimate daughter should, for the purposes of the trust, be deemed to be a lawful child, has been held to mean as if the wife had died without having been married to her then intended husband. *Wilson v. Atkinson*. 4 D. J. & S. 455.

Next of kin explained by the context.

Gift to next of kin of A. as if she had died unmarried.

Without having been married.

A similar construction has been adopted, where there was no explanatory context, and the words have even been held to be equivalent to "without leaving a husband." *Upton v. Brown*, 12 Ch. D. 872; *In re Ball's Trust*, 11 Ch. D. 270.

It seems, however, that such clear words as "without ever having been married" must be construed in their natural sense, unless there is a strong context. *Emmins v. Bradford*, 13 Ch. D. 493.

At what time the next of kin are to be ascertained.

The terms next of kin and heirs have a direct reference to the death of the ancestor, and therefore next of kin and heirs are to be ascertained at the death of the ancestor; and, where there is in addition a reference to the statute or to intestacy, this rule is almost without exception.

A mixed fund is no exception to the ordinary rule.

The same rules apply to realty, personalty, and to a mixed fund. *Cusack v. Rood*, 24 W. R. 391.

1. Thus the rule applies, whether the bequest to next of kin is immediate or preceded by a life interest or contingent. *Moss v. Dunlop*, Joh. 490; *Bird v. Luckie*, 8 Ha. 301.

2. And, if the gift is to next of kin living at a particular time, it will go to such of the next of kin at the testator's death as are living at that time. *Spink v. Lewis*, 3 B. C. C. 355.

3. If there is a devise to A. for life with remainder to his eldest son for life, with a direction on his death to convey the estate to the heir male of A., the eldest son of A. is entitled on A.'s death to have the fee conveyed to him. *In re Grayson*, 48 L. J. Ch. 354.

Similarly, if personalty is given to A. for life and then to the testator's next of kin, though A. may be one of the next of kin, or even the only next of kin, at the testator's death, or even the only next of kin at the date of the will as well as at the testator's death, the class will nevertheless be ascertained at the testator's death. *Doe v. Lawson*,



3 East, 278; *Ware v. Rowland*, 2 Ph. 635; *Holloway v. Holloway*, 5 Ves. 399; *Barker's Trust*, 1 Sm. & G. 118; *Gorbell v. Davison*, 18 B. 556; *Starr v. Newberry*, 23 B. 436.

The mere exception from the class of next of kin of certain persons, who could only be members of the class on the supposition of the death of the tenant for life, will not alter the time for fixing the class. *Lee v. Lee*, 1 Dr. & Sm. 85; see *Cooper v. Dennison*, 13 Sim. 290.

4. Where, however, the gift is to the next of kin of a deceased person, and the tenant for life is the sole next of kin at the date of the will, so that the class cannot be increased if the tenant for life survives the testator, there is a stronger argument against ascertaining the next of kin at the testator's death; but probably this circumstance would not alone be sufficient to oust the rule. *Wharton v. Baker*, 4 K. & J. 483.

5. The same rules apply, where the gift to the next of kin is not by way of remainder, but by way of executory limitation.

Thus, in a gift to A. for life, where A. is sole next of kin at the date of the will and death, and then to her children, or to A. absolutely, and if she dies without children, or under twenty-one, to the testator's next of kin, the next of kin are ascertained at the testator's death. *Lang's Will*, 9 W. R. 589; *Murphy v. Donegan*, 3 J. & Lat. 534; *Baker v. Gibson*, 12 B. 101; *Harrison v. Harrison*, 28 B. 21; *Michell v. Bridges*, 13 W. R. 200; see *Urquhart v. Urquhart*, 13 Sim. 613; *Minter v. Wraith*, 14 Sim. 549.

The case is, however, different, if the gift is not to next of kin, but to the "nearest of kin of my own family," or to relations. *Clapton v. Bulmer*, 5 M. & Cr. 108; see pp. 264, 265.

In the former case the intention is to let the property go

as the law would give it, in the latter to make a complete disposition by the will to a particular class contemplated by the testator, though, owing to the vagueness of the description, the Courts may be compelled to have recourse to the statute, that the gift may not be void for uncertainty.

6. Even if the gift be to a class of persons, who must be the testator's next of kin, if any survive him, and if they die without issue to his next of kin, the next of kin are ascertained at his death. *Seifferth v. Badham*, 9 B. 372.

7. The testator may of course direct the class of next of kin to be ascertained at any time or in any manner he chooses. *Pinder v. Pinder*, 28 B. 44; *White v. Springett*, 4 Ch. 300.

Effect of  
words of  
futurity in  
ascertain-  
ing the  
class.

The mere use of words of futurity will not alter the ordinary rule; for instance, if the bequest be to A. for life and after his death for such persons, as shall be my next of kin. *Holloway v. Holloway*, 5 Ves. 399; *Doe v. Lawson*, 3 East, 278; *Rayner v. Mowbray*, 3 B. C. C. 234.

But, if the gift is, after the decease of the tenant for life, to such persons as shall *then* be my next of kin, the word "*then*" must refer to the death of tenant for life. *Long v. Blackall*, 3 Ves. 486; *Wharton v. Barker*, 4 K. & J. 483; see *Clowes v. Hilliard*, 4 Ch. D. 413; *In re Morley's Trusts*, 25 W. R. 825.

But it must be clear, that the word "*then*" is used temporally and not as equivalent to thereupon, and that it may not be referred to other words pointing to the testator's death, as will be the case if the gift is, for instance, "to such persons as would by virtue of the statutes for the distribution of intestates' estates have become and been then entitled thereto in case I had died intestate." *Bullock v. Downes*, 9 H. L. 1; *Doe v. Lawson*, 3 East, 278; *Cable v. Cable*, 16 B. 507; *Wheeler v. Adams*, 17

B. 417; *Fletcher v. Fletcher*, 3 D. F. & J. 775; *Day v. Day*, I. R. 4 Eq. 385; *Mortimore v. Mortimore*, 4 App. C. 448.

Where the gift is to next of kin of a person dead at the date of the will, the class is ascertained at the testator's death. *Phillips v. Evans*, 4 De G. & Sm. 188.

Gifts to next of kin of a deceased person.

And the rule would be the same if the person, whose next of kin are the legatees, is not dead at the date of the will, but dies in the testator's lifetime. *Vaux v. Henderson*, 1 J. & W. 388; *Gryll's Trusts*, 6 Eq. 589.

But this rule gives way to an intention that the next of kin of the deceased person are to be ascertained at his death. *Ham's Trust*, 2 Sim. N. S. 106; 15 Jur. 1121.

And, if the gift is to the next of kin of a person, who survives the testator, the class is ascertained at the death of that person. *Gundry v. Pinniger*, 1 De G. M. & G. 502; *Jacobs v. Jacobs*, 16 B. 557; *Markham v. Ivatt*, 20 B. 579.

Next of kin of a living person.

# REPRESENTATIVES.

The words representatives, legal representatives, personal representatives, or legal personal representatives, must, in the absence of other controlling words, be taken to mean persons claiming as executors or administrators. *Crawford's Trust*, 2 Dr. 230; *Hinchcliffe v. Westwood*, 2 De G. & Sm. 216; *Dixon v. Dixon*, 24 B. 129; *Re Turner*, 2 Dr. & Sm. 501; *Smith v. Barneby*, 2 Coll. 728; *Wyndham's Trust*, L. R. 1 Eq. 290; *Alger v. Parrott*, 3 Eq. 328; *Best's Settlement*, 18 Eq. 686.

Gift to representatives.

If, however, there is an indication of intention that the representatives are to take beneficially and not in any fiduciary capacity, the words can hardly be referred to executors or administrators, and they will generally mean statutory next of kin, including a widow, but not a husband. *Cotton v. Cotton*, 2 B. 67; *Smith v. Palmer*, 7

In what cases representatives mean next of kin.

Ha. 225; *Holloway v. Radcliffe*, 23 B. 163; *King v. Cleveland*, 26 B. 166; 4 De G. & J. 477.

It would seem that by analogy to the case of heirs the statute would fix the proportions as well as the persons, and that *Walker v. Marquis of Camden*, 16 Sim. 329, would not now be followed.

Substituti-  
tional gift.

1. If the gift is substitutional, as, for instance, to A. or his legal representatives, or even to A., and if he dies before me to his representatives, there is an *a priori* improbability, that the testator meant to benefit the estate of the legatee if he died in his own lifetime, while the legatee himself could derive no benefit from the legacy unless he survived the testator, and therefore representatives will be read as equivalent to statutory next of kin. *Bridge v. Abbott*, 3 B. C. C. 224; *Cotton v. Cotton*, 2 B. 67; see *Hewetson v. Todhunter*, 22 L. J. Ch. 76.

And if the gift is to several related persons, or their respective representatives, representatives will mean descendants. *Styth v. Monro*, 6 Sim. 49. See *Horsepool v. Watson*, 3 Ves. 383; *Atherton v. Crowther*, 19 B. 448; *In re Booth*; *Fytton v. Booth*, W. N. 1877, 129.

Prior life  
estate.

2. Where there is a prior life estate the reasons for construing "legal representatives" as next of kin do not apply.

The substitutional words may be considered as inserted merely *ex abundanti cautela*, to provide for the death of the legatee in the lifetime of the tenant for life. *In re Crawford*, 2 Dr. 230, 242; *Re Henderson*, 28 B. 656; *Hinchcliffe v. Westwood*, 2 De G. & S. 216; *Chapman v. Chapman*, 33 B. 556; *Re Turner*, 2 Dr. & Sm. 501.

The same is the case where there is a direct gift to A. or his personal representatives, but the time of payment is postponed, or a gift to A., and if he dies before the whole is expended, to his representatives. *Thompson v. White-lock*, 4 De G. & J. 490; *Dixon v. Dixon*, 24 B. 129.

3. If there are words of distribution, such as "to and amongst," or "share and share alike," and similar expressions, showing that the "representatives" are to take beneficially, the legacy will go to the statutory next of kin. *King v. Cleveland*, 4 De G. & J. 477; *Baines v. Ottey*, 1 M. & K. 465; *Smith v. Palmer*, 7 Ha. 225.

This, however, does not apply where the gift being to the representatives of several persons who take life interests, the words of distribution can be referred to the *stirpes*. *Wing v. Wing*, 24 W. R. 878

4. If the words executors and administrators have been used in other parts of the will, this is an argument to show, that representatives must mean something else. *Jennings v. Gallimore*, 3 Ves. 146; *King v. Cleveland*, 4 De G. & J. 477; *Nicholson v. Wilson*, 14 Sim. 549; *Walker v. Marquis of Camden*, 16 Sim. 329; *Briggs v. Upton*, 7 Ch. 376.

5. Where there is a direction to pay to personal representatives, the fact that an executor is appointed, would be a strong argument in favour of next of kin. *Robinson v. Smith*, 6 Sim. 47; *Walter v. Makin*, 6 Sim. 148; *Jennings v. Gallimore*, 3 Ves. 146. See *Briggs v. Upton*, *supra*.

6. The same result will follow, if there are words added to the term "representatives" inconsistent with the meaning "executors or administrators," such as "personal representatives or next of kin" (a); or, "such persons as would be the personal representatives of my daughter in case she had died unmarried" (b); or, "legal personal representatives at the time of her death" (c); or, "next legal or personal representatives" (d). *Phillips v. Evans*, 4 De G. & Sm. 188 (a). *Gryll's Trust*, 6 Eq. 589 (b). *Robinson v. Evans*, 22 W. R. 199; 43 L. J. Ch. 82; *Long v. Blackall*, 3 Ves. 486 (c). *Booth v. Vicars*, 1 Coll. 6; *Stockdale v. Nicholson*, 4 Eq. 359 (d).

Whether, in this latter case, the next of kin proper or the statutory next of kin take, see *Booth v. Vicars*, *supra*; *Stockdale v. Nicholson*, *supra*.

A gift to personal representatives *per stirpes*, and not *per capita*, has been held to mean descendants. *Ather-ton v. Crowther*, 19 B. 448.

For a direction to pay to "legal representatives according to the course of administration," see *Jennings v. Gal-limore*, 3 Ves. 146; *Briggs v. Upton*, 7 Ch. 376.

Effect of  
the word  
assigns.

It would seem, that the addition of the word assigns in a substitutional gift to heirs or representatives would make it impossible to construe these words as equivalent to next of kin. *Graftey v. Humpage*, 1 B. 46; *Waite v. Templer*, 2 Sim. 524.

#### EXECUTORS.

Whether a  
substitu-  
tional gift  
to execu-  
tors goes  
to the next  
of kin.

There is some doubt, whether a gift to A., and in case of his death to his executors or administrators, will go to A.'s executors in the event of his death before the testa-tor. In *Palin v. Hills*, 1 M. & K. 470, it was held that executors in such a case must mean next of kin. This case has, however, been frequently questioned, and is closely hedged round by hostile cases, though it cannot be said to be overruled. At any rate, if there is an intention shown to benefit the estate of A., executors will be con-strued strictly.

There was such an intention in *Long v. Watkinson*, 17 B. 471, where the bequest was, in the event of the legatees dying in the testator's lifetime to the executors they may appoint, thus excluding next of kin who derive their title under an intestacy.

The same was the case in *Re Seymour's Trusts*, Johns. 472, where the gift was to children living at the death of A., and to the executors of those who should be then

dead leaving children, thus showing an intention to benefit the children of those dead.

In *Maxwell v. Maxwell*, 1 R. 2 Eq. 478, the construction was assisted by a direction to pay money due to the same legatees under an appointment to them or their executors. See, too, *Aspinall v. Duckworth*, 35 B. 307; *Re Morgan's Trusts*, 2 W. R. 439.

Of course where there is a future gift to A. or his executors the word executors will be treated as inserted to provide for the death of the donee before the time of vesting in possession. See *Stocks v. Dodsley*, 1 Kee. 325.

It appears to be now settled, notwithstanding *Evans v. Charles*, 1 Anstr. 128, that executors taking substitutionally take the property to be administered as part of the assets of the original legatee. *Stocks v. Dodsley*, 1 Kee. 325; *Leake v. Macdowell*, 33 B. 238.

Executors taking substitutionally take trust for the next of kin.

Similarly, a gift to the executors of a dead person is a gift to his legal personal representatives as part of his estate. *Trethewy v. Helyar*, 4 Ch. D. 53.

A general or specific legacy given by a testator to his executors, whether under the title of executors or not, is *prima facie* given to them in that character, and therefore they are not entitled to the legacies if they decline or are incapable of undertaking the office. *Reed v. Devaynes*, 2 Cox, 285; 3 B. C. C. 95; *Calvert v. Sibbon*, 4 B. 222; *Hanbury v. Spooner*, 5 B. 630; *Hawkins' Trust*, 33 B. 570; *Piggott v. Green*, 6 Sim. 72; *Slaney v. Watney*, L. R. 2 Eq. 418.

Gifts to the testator's executors only go to them if they accept the office.

To entitle an executor to receive his legacy, it is sufficient, if he either proves the will, which he may do at any time before the estate is fully administered, or if he acts as executor. *Hollingsworth v. Grassett*, 15 Sim. 52; *Angermann v. Ford*, 29 B. 349; *Harrison v. Rowley*, 4 Ves. 212; *Lewis v. Matthews*, 8 Eq. 277.

What is a sufficient acceptance of the office.

And it seems, that if the legacy is directed to be paid

within twelve months, and there is nothing to show that the executor refuses to act, he is entitled to his legacy if he survives the twelve months. *Brydges v. Wotton*, 1 V. & B. 134.

But if the executor acts fraudulently, the mere taking out probate will not entitle him to his legacy. *Harford v. Browning*, 1 Cox, 302.

In what cases the executor is entitled though he does not act.

The presumption that a legacy to an executor is given to him in that character for his trouble, may be rebutted :

1. If some other motive is expressed, as if the gift is to "my friend and executor." *Re Denby*, 3 D. F. & J. 350; *Dix v. Reed*, 1 S. & St. 237; *Burgess v. Burgess*, 1 Coll. 367; *Bubb v. Yelverton*, 13 Eq. 131.

2. If the gifts to the executors are unequal in amount, or a legacy is given to one and not the other. *Cockerell v. Barber*, 2 Russ. 585; *Jewis v. Lawrence*, 8 Eq. 345; *Wildes v. Davies*, 1 Sm. & G. 475.

3. If the gift is after a life interest. *In re Reeve's Trusts*, 4 Ch. D. 841.

4. If there is a direction that in the event of the executor's death before the testator, his legacy is to go to his next of kin. *In re Bunbury's Trusts*, 1 R. 10 Eq. 408.

5. The presumption does not arise if the gift is of residue. *Parsons v. Saffery*, 9 Pr. 578; *Griffith v. Pruett*, 11 Sim. 202; *Christian v. Devereux*, 12 Sim. 264.

Whether a gift of residue to executors is beneficial or in trust.

Whether a gift of residue to executors is a gift to them for their own benefit, or whether they take in trust for the next of kin, depends on the general scheme of the will, and is not affected by the statute 1 Will. IV. c. 40. *Williams v. Arkle*, *infra*.

Thus the following circumstances are in favour of the executors taking beneficially:—

If the gift is not to the executors as such, but by name. *Williams v. Arkle*, L. R. 7 H. L. 606; *Re Henshaw*, 12



W. R. 1139; 34 L. J. Ch. 98; *Hillersden v. Grove*, 21 B. 518.

If the gift is subject to certain payments. *Parsons v. Saffery*, 9 Pr. 578.

On the other hand, the fact that prior legacies have been given to them, or that the bequest is to them as joint tenants, is against their right to the beneficial interest, though not alone conclusive. *Gibbs v. Rumsey*, 2 V. & B. 294; *Re Henshaw, supra*; *Saltmarsh v. Barrett*, 3 D. F. & J. 279; see *Buckle v. Bristow*, 13 W. R. 68.

And a direction that the executors are to retain their costs would, it seems, show that they were not to take beneficially. *Saltmarsh v. Barrett, supra*.

But a reimbursement clause, where there are continuing trusts, will not have this effect. *Romans v. Mitchell*, 15 W. R. 552.

So where there is no gift to the executors, a direction that they, their heirs, successors, representatives, or descendants may apply and distribute the same as to them may appear just, makes them trustees for the next of kin. *Neo v. Neo*, L. R. 6 P. C. 381; see *Barrs v. Fewkes*, 12 W. R. 666; 13 *ib.* 987.

## CHAPTER XXVI.

## GIFTS TO CHARITABLE USES.

## I. WHAT ARE CHARITABLE GIFTS.

Instances  
of charit-  
able gifts.

CHARITY, in the legal sense, does not necessarily imply relief of the poor. The stat. 43 Eliz. c. 4, defines various kinds of charities. But generally it may be said every gift for a public purpose, local or general, is charitable. See cases cited in the note to *Loscombe v. Wintringham*, 13 B. 87.

Thus gifts for the advancement of education and learning in every part of the world; for the glory of God in the spiritual welfare of His creatures; for the advancement of Great Britain; to any religious institution or purposes; or for charities and other public purposes in a certain parish, are charitable. *Whicker v. Hume*, 7 H. L. 124; *Townshend v. Carus*, 3 Ha. 257; *Powerscourt v. Powerscourt*, 1 Moll. 616; *Nightingale v. Goulbourne*, 5 Ha. 484; 2 Ph. 594; *Wilkinson v. Lindgren*, 5 Ch. 570; *Dolan v. Macdermot*, 3 Ch. 676.

So, too, gifts for any educational or religious purpose, not contrary to morality or the law, are charitable. *Thornton v. Howe*, 31 B. 14; *Beaumont v. Oliveira*, 4 Ch. 309.

For the construction of a gift to the hospitals of London, see *Wallace v. A.-G.*, 33 B. 384.

Bequest  
for pur-

A bequest for objects of liberality or benevolence, or for

"purposes of general utility," is not charitable. *Morice v. Bp. of Durham*, 9 Ves. 399; 10 Ves. 521; *James v. Allan*, 3 Mer. 17; *Kendall v. Granger*, 5 B. 300; see *In re Jarman's Estate*; *Leavers v. Clayton*, 8 Ch. D. 584. poses of liberality or benevolence is not charitable.

And a bequest for private charity is void. *Ommaney v. Butcher*, T. & R. 260. Private charity.

A bequest to a voluntary society existing for charitable purposes is charitable. *Cocks v. Mannors*, 12 Eq. 574. What is a charitable society.

But a gift to a similar society for the use and benefit of the society is not charitable, the object being not to benefit the charitable objects of the community, but the members of it themselves. *Stewart v. Green*, I. R. 5 Eq. 470. Voluntary association existing for private purposes of its members is not charitable.

A gift to a voluntary society existing merely for purposes of religious intercourse and edification of its members is not charitable. *Cocks v. Mannors*, *supra*.

Nor is a similar gift to a society existing merely for the mutual benefit of its members. *In re Clark's Trust*, 1 Ch. D. 497; *Thompson v. Shakespeare*, Jo. 612; 1 D. F. & J. 399; *Carne v. Long*, 2 D. F. & J. 75; *Re Dutton*, 4 Ex. D. 54.

A gift for the use and benefit of a parish is charitable. *A.-G. v. Lord Hotham*, T. & R. 209; *A.-G. v. Webster*, 20 Eq. 483. Benefit of parish.

A gift to build or repair the tomb of the testator or his family, not within a church, is not charitable. *Mellick v. President of the Asylum*, Jac. 180; *Lloyd v. Lloyd*, 2 Sim. N. S. 255; *Adnam v. Cole*, 6 B. 353; *Rickard v. Robson*, 31 B. 244; *Hoare v. Osborne*, L. R. 1 Eq. 585. Gift to build or repair a tomb is not a charity.

Nor is such a gift within the statute 43 Geo. III. c. 108. *Re Rigley's Trust*, 15 W. R. 190; 36 L. J. Ch. 147.

Such a gift, therefore, if it involves a perpetuity, is void. *Rickard v. Robson*, *supra*; *Yeap Cheah Neo v. Ong Ching Neo*, L. R. 6 P. C. 381.

But bequests to repair the fabric of the church, or even

pair the fabric of a church. the ornaments within it, such as a monument or tomb, are charitable. *Hoare v. Osborne*, L. R. 1 Eq. 585.

Position of Dissenters and Roman Catholics. Dissenters and Roman Catholics are, as regards bequests for charitable purposes, on the same footing as the Established Church. 1 W. & M. c. 18; 2 & 3 Will. IV. c. 115, s. 1; *A.-G. v. Pearson*, 3 Mer. 353, 405.

Dissenters. Thus bequests for the maintenance of Protestant Dissenters, or for the assistance of Unitarian congregations, or for the benefit of Irvingites, are valid. *A.-G. v. Pearson*, 3 Mer. 353; *Shrewsbury v. Hornby*, 5 Ha. 406; *A.-G. v. Lawes*, 8 Ha. 32.

Roman Catholics. So bequests to be applied to the use of Roman Catholic schools, or of a Roman Catholic college existing for the education of ecclesiastics and laymen, or to promote the Roman Catholic religion, or to assist in the completion of a Roman Catholic cathedral, are good. *Bradshaw v. Tasker*, 2 M. & K. 221; *Walsh v. Gladstone*, 1 Ph. 290; *West v. Shuttleworth*, 2 M. & K. 684; *Dillon v. Reilly*, 1 R. 10 Eq. 152.

Jews. By 9 & 10 Vict. c. 59, s. 2, Jews are, in respect to their schools, places for religious worship, education and charitable purposes, and the property held therewith, subject to the same laws as Protestant subjects dissenting from the Church of England.

Since this statute bequests to enable persons professing the Jewish religion to observe its rites are valid. *Straus v. Goldsmid*, 8 Sim. 614; *In re Michel's Trusts*, 28 B. 39.

Monastic orders. It has been held in Ireland that bequests in favour of Jesuits and members of other religious orders of the Church of Rome bound by monastic or religious vows are void, as contravening the policy of 10 Geo. IV. c. 7 (see sections 33—36). No doubt the same rule would be applied in England.

Thus bequests to be applied for the education and maintenance of priests of the order of St. Dominick in

Ireland, and for the use of the Franciscan Convent at Wexford, have been held to be void. *Sims v. Quinlan*, 16 Ir. Ch. 191; 17 Ir. Ch. 43; *Walsh v. Walsh*, I. R. 4 Eq. 396; *Kehoe v. Wilson*, 7 L. R. Ir. 10.

Upon a similar principle a bequest to purchase the discharge of poachers committed for non-payment of fines, fees, or expenses under the Game Laws was held to be void. *Thrupp v. Collett*, 26 B. 125. Release of poachers.

The statutes removing religious disabilities have not affected bequests to superstitious uses. Superstitious uses.

The statute of 1 Edw. VI. c. 14, relates only to certain superstitious uses then existing. The earlier statute, 23 Hen. VIII. c. 10, relates only to assurances of land to churches and chapels. But by analogy to these statutes certain bequests are considered void as being superstitious uses. *Cary v. Abbot*, 7 Ves. 490.

Thus bequests to priests for offering masses for the souls of the dead are void, notwithstanding 2 & 3 Will. IV. c. 115, and go to the next of kin. *West v. Shuttleworth*, 2 M. & K. 684; *Heath v. Chapman*, 2 Dr. 417; *Re Blundell's Trusts*, 30 B. 360; *In re Fleetwood*; *Sidgreaves v. Brewer*, 49 L. J. Ch. 514; 15 Ch. D. 594. Bequests for masses.

Land devised for a superstitious use goes to the heir. *R. v. Portington*, 3 Salk. 334; *Crofts v. Evetts*, Moore, 784.

Bequests for offering up masses for the souls of the dead are not illegal in Ireland. *Commissioners of Charitable Donations v. Walsh*, 7 Ir. Eq. 34; *Read v. Hodgins*, *ib.* 17; *Brennan v. Brennan*, I. R. 2 Eq. 321. Bequests for masses in Ireland.

Such bequests, however, though not illegal in Ireland, are not charitable, and are void if they tend to a perpetuity. *Dillon v. Reilly*, I. R. 10 Eq. 152; *Kehoe v. Wilson*, 7 L. R. Ir. 10; see *A.-G. v. Delaney*, I. R. 10 C. L. 104.

By the Roman Catholic Charities Act, 23 & 24 Vict. c. 134, s. 1, it is in effect provided, that dispositions of

real or personal estate upon any lawful charitable trust in favour of Roman Catholics shall not be invalidated by reason that the same estate is subjected to a trust deemed to be superstitious, but the property may be apportioned, and a portion applied to the lawful charitable trusts declared by the donor, and the rest applied to charitable purposes for the benefit of Roman Catholics as the Court or the Charity Commissioners may think just.

As to the application of the doctrine of superstitious uses to British Colonies, see *Yeap Cheah Neo v. Ong Ching Neo*, L. R. 6 P. C. 381, and the authorities there quoted.

Gifts for the relief of aged, impotent, and poor people.

Gifts for the relief of aged, impotent, and poor people are enumerated as charitable by the statute 43 Eliz. c. 4. See *Nush v. Morley*, 5 B. 177; *Thompson v. Corby*, 27 B. 649.

But none of these words are necessary to constitute a charitable gift: thus, a gift for the widows and orphans of a parish, or the widows and children of the seamen of Liverpool, is charitable. *A.-G. v. Coombe*, 2 S. & St. 93; *Powell v. A.-G.*, 3 Mer. 48.

A gift in favour of the poor does not include persons receiving parochial relief. *A.-G. v. Price*, 3 Atk. 109; *Bishop of Hereford v. Adams*, 7 Ves. 324; *A.-G. v. Corporation of Exeter*, 2 Russ. 47; 3 *ib.* 396; *A.-G. v. Brandreth*, 1 Y. & C. C. 200; *A.-G. v. Bovill*, 1 Ph. 762; *A.-G. v. Blizard*, 21 B. 233.

Gifts to poor relations.

On the question whether a gift to poor relations is charitable:—

1. Of a lump sum immediately distributable.

1. When the gift is of a lump sum immediately distributable, the cases are very unsatisfactory.

*a.* In several cases it has been held that a gift to poor relations is to be confined to statutory next of kin, thus implying that the gift is not charitable, since, if it were no question of uncertainty could have arisen. *Carr v.*

*Bedford*, 2 Ch. Rep. 146; *Griffith v. Jones*, *ib.* 394, anno 1694; *Widmore v. Woodroffe*, Amb. 636.

On the other hand, relations were not so restricted in *A.-G. v. Buckland*, cit. Amb. 71; 1 Ves. sen. 231; and *Mahon v. Savage*, 1 Sch. & Lef. 111.

In *Edge v. Salisbury*, Amb. 70; S. C. nom. *Goodynge v. Goodynge*, 1 Ves. sen. 230; Belt, 128, where the words were "nearest relations," of course only next of kin could take.

b. In *Brunsdon v. Woolridge*, Amb. 507; 1 Dick. 380, where the will was dated in 1757, and was therefore, since the Mortmain Act, a gift of *realty* to such poor relations as A. should think objects of charity, was held valid, and therefore not charitable; and see *Thomas v. Howell*, 18 Eq. 198. But *quære* whether these cases are satisfactory, and whether a gift to poor relations would not now be considered charitable.

2. If, however, the gift is not of a sum distributable at once but of an annual sum, or if the testator has contemplated a perpetuity, the gift is charitable and not confined to statutory next of kin. *Isaac v. Defries*, Amb. 595; 17 Ves. 373, n.; *A.-G. v. Price*, 17 Ves. 371; *White v. White*, 7 Ves. 423; *Hall v. A.-G.*, 2 Jarm. on Wills, 114; *Gillam v. Taylor*, 16 Eq. 581.

If the gift is charitable only members of the class who are objects of charity, as defined by the statute of Elizabeth, can claim under it. Persons are not entitled to the benefit of the gift merely because they are the poorest of a wealthy class. *A.-G. v. Duke of Northumberland*, 7 Ch. D. 745.

A direction to distribute rents among certain named families as they may need has been held not to be a charity. *Lilley v. Hay*, 1 Ha. 580; *sed quære*.

In some cases the question arises, whether a bequest is given in respect of a certain office, and is therefore charitable. Gifts in respect of an office.

able, or whether the office is merely used to describe the person.

Thus, a gift to A., minister of a certain church, is not charitable. *Doe d. Phillips v. Aldridge*, 4 T. R. 264; *Donnellan v. O'Neill*, 1 R. 5 Eq. 523.

But a gift to A., minister of a chapel, and his successors for ever, is charitable. *Thornber v. Wilson*, 3 Dr. 245; see *Robb v. Bp. Dorian*, 1 R. 9 C. L. 483; *ib.* 11 C. L. 292.

Similarly, a gift for the benefit of Roman Catholic priests in or near London is charitable. *A.-G. v. Gladstone*, 13 Sim. 7; 1 Ph. 290.

It has, however, been held that a gift to ten poor clergymen to be selected by a trustee, is not charitable. *Thomas v. Howell*, 18 Eq. 198; and see *A.-G. v. Baxter*, 1 Vern. 248; 2 Vern. 104; explained in 7 Ves. 76.

Gift to trustees of a charity without more is not charitable.

A bequest to the trustees of a charity for a purpose to be declared, which the testator never does declare, affords no inference that the purpose was charitable, and is therefore void. *Corporation of Gloucester v. Wood*, 3 Ha. 131; 1 H. L. 272; *Aston v. Wood*, 6 Eq. 419.

## II. THE DOCTRINE OF CY PRÈS.

Gift to a particular charitable society may fail by lapse.

1. If there is a gift to a particular charitable society by name, and the society has existed, but at the time of the testator's death has ceased to exist, the legacy fails. *Clark v. Taylor*, 1 Dr. 642; *Marsh v. Means*, 3 Jur. N. S. 790; *Russell v. Kellett*, 3 Sm. & G. 264; *Langford v. Gowland*, 3 Giff. 617; *Fisk v. A.-G.*, 4 Eq. 521; *Makeown v. Ardagh*, 1 R. 10 Eq. 445.

If, however, the charity exists at the testator's death, but expires before the estate is administered, the legacy goes to charitable purposes *cy près*. *Hayter v. Trego*, 5 Russ. 113.

General

And, if the bequest to the society is expressed to be for



a charitable object, the failure of the trustee will not destroy the charitable gift. *Templemoyle School*, 1 R. 4 Eq. 295; *Carbery v. Cox*, 3 Ir. Ch. 231; *Marsh v. A.-G.*, 2 J. & H. 61. charitable intention.

If the society is misdescribed, the Court will, if possible, discover from surrounding circumstances what society was intended. *Wilson v. Squire*, 1 Y. & C. C. 654; *Bunting v. Marriott*, 19 B. 163; *Kilvert's Trusts*, 12 Eq. 183; 7 Ch. 170; see *Coldwell v. Holme*, 2 Sm. & G. 31; *Makeown v. Ardagh*, 1 R. 10 Eq. 445. Misdescription of a charitable society.

If, however, there is no existing charitable society sufficiently, or there are several equally, answering the description, the gift will not be void, but will be applied *cy près* to charitable purposes, or be divided among the several claimants. *Simon v. Barber*, 5 Russ. 112; *Re Clergy Society*, 2 K. & J. 615; *Loscombe v. Wintringham*, 13 B. 87; *Re Maguire*, 9 Eq. 632; *Re Alchin's Trusts*, 14 Eq. 230.

2. A gift for a clearly-defined and particular charitable object, as to build a church in a particular place, will fail if the object becomes impossible. *A.-G. v. Bishop of Oxford*, 1 B. C. C. 444 n.; *Cherry v. Mott*, 1 M. & C. 123; *Russell v. Kellett*, 3 Sm. & G. 264; see, however, as to the limits of this doctrine, *A.-G. v. Bowyer*, 3 Ves. 724; *Abbott v. Fraser*, L. R. 6 P. C. 96. Gift for a definite charitable object fails if the object is impossible.

In such a case it seems the Court will retain the fund for a time and direct an inquiry as to the possibility of carrying out the bequest. *A.-G. v. Bishop of Chester*, 1 B. C. C. 444; *Baldwin v. Baldwin*, 22 B. 419; *Sinnett v. Herbert*, 7 Ch. 232; *Chamberlayne v. Brockett*, 8 Ch. 206; see, too, *Abbott v. Fraser*, L. R. 6 P. C. 96. The Court will direct an inquiry as to the possibility of effecting the object.

Though, on the other hand, if the gift to the charity is expressly made upon some event which is too remote, the gift would be void: as, for instance, a gift of a sum of money to build almshouses, when land should be given. *Chamberlayne v. Brockett*, *supra*. Gift to charity upon an event too remote is void.

Discretion  
to trustees  
to apply  
the whole  
to charity  
or other  
indefinite  
objects.

3. Where a discretion is left to trustees, which would empower them to apply the whole of the gift either to charitable or other indefinite purposes, the whole gift is void, as it does not appear that the chief object was charity, and, on the other hand, the other object is void for uncertainty. *Williams v. Kershaw*, 5 L. J. Ch. 84; 5 Cl. & F. 111; *James v. Allen*, 3 Mer. 17; *Morice v. Bishop of Durham*, 9 Ves. 399; 10 Ves. 521; *Ommaney v. Butcher*, T. & R. 260; *Vezey v. Jamson*, 1 S. & St. 69; *Kendall v. Granger*, 5 B. 300; *Thompson v. Thompson*, 1 Coll. 398; *Boyle v. Boyle*, 1 R. 11 Eq. 433.

It has recently been decided, that the trustees cannot exercise their discretion and appoint the whole to charity. *In re Jarman's Estate*; *Leavers v. Clayton*, 8 Ch. D. 584.

Whether the result would be the same, where the whole might have been applied by the trustees either to charity or some other definite and ascertained object, seems uncertain. *Down v. Worrall*, 1 M. & K. 561; a case of very doubtful authority.

If part  
must be  
applied in  
charity,  
the Court  
will ascer-  
tain the  
amount.

But, if the bequest is such, that a portion must be applied to charity, the gift is good, although the charitable trust may be coupled with other trusts, which are void for uncertainty.

In such a case, if it cannot be ascertained how much ought to be applied to each object, the gift will be equally divided among the several objects, including those which are void, as to which the gift will fail *pro tanto*. *Doyley v. A.-G.*, 4 Vin. 485; 7 Ves. 58 n.; *Salisbury v. Denton*, 3 K. & J. 529; *Crafton v. Frith*, 20 L. J. Ch. 198; *Hoare v. Osborne*, L. R. 1 Eq. 585; *In re Rigley's Trusts*, 36 L. J. Ch. 147; see, too, *Re Hall's Charity*, 14 B. 115.

If it is possible to estimate how much ought to be given to each object, an inquiry will be directed. *Adnam v. Cole*, 6 B. 353; *Champney v. Davy*, 11 Ch. D. 949.

4. If it is clear that the testator intended to give to charity generally, the bequest will not fail : Where there is a general charitable intent, the gift is applied *cy près*.

a. by the failure of the testator to appoint the particular objects he intends to benefit, though the bequest may be to such charitable uses as he shall appoint. *Mills v. Farmer*, 1 Mer. 55 ; *Commissioners of Charitable Donations v. Sullivan*, 1 D. & War. 501 ; *Gillan v. Gillan*, 1 L. R. Ir. 114 ; *Pocock v. A.-G.*, 3 Ch. D. 342.

b. or by reason of the death, revocation of the appointment, or refusal to act of persons in whom a similar power has been vested. *Moggridge v. Thackwell*, 7 Ves. 36 ; 13 Ves. 416 ; *White v. White*, 1 B. C. C. 12 ; *A.-G. v. Boulton*, 2 Ves. jun. 380 ; 3 Ves. 220.

c. or by the failure or non-existence of the particular objects he has pointed out. *Loscombe v. Wintringham*, 13 B. 87 ; *Hayter v. Trego*, 5 Russ. 113 ; *Reeve v. A.-G.*, 3 Ha. 191.

d. or even by the fact that some of the objects specified are void. *Fisk v. A.-G.*, 4 Eq. 521 ; *Dawson v. Small*, 18 Eq. 114.

e. or by the fact that the bequest is to be applied to a particular object at a future time beyond the limits of perpetuity. *Chamberlayne v. Brockett*, 8 Ch. 206.

5. Where there is a general charitable intention, particular gifts to charity will be applied *cy près*, and will not fall into the residue, though the residue itself may be given to a charitable object, unless the particular gifts are expressly directed to fall into the residue upon failure of the charitable objects to which they are given. *Lyons v. Advocate-General of Bengal*, 1 App. C. 91. Whether particular charitable gifts which fall into the residue which is also given to charity.

6. Where a bequest is void as contravening the policy of a statute, it will not be carried out *cy près*. *Thrupp v. Collett*, 26 B. 125 ; *Sims v. Quinlan*, 16 Ir. Ch. 191 ; 17 *ib.* 43 ; *Walsh v. Walsh*, 1 R. 4 Eq. 397. Gift contrary to policy of a statute.

7. Where the whole of the rents and profits of land are Increase

in value of rents and profits given to charity. given to charity, but the objects pointed out do not exhaust the fund, the Court distributes the surplus *cy près*. *Arnold v. A.-G.*, Shower P. C. 22; *Pieschel v. Paris*, 2 S. & St. 384.

Whole rent given to charity, the increase also passes. Where a sum, which in fact amounts to the whole of the rents and profits of certain land, is given to charity, this is in effect a dedication to charity of the land itself, and any increase in the rents and profits goes to the same purposes. *Thetford School Case*, 8 Co. R. 130 b.

Similarly, if the testator has shown an intention to dispose of the whole to charitable purposes, though there may be a residue undisposed of, it will go to the same purposes. *A.-G. v. Drapers*, 2 B. 508.

And where the whole rents are given in certain proportions among several charitable objects, any increase is apportioned rateably among those objects, subject to the discretion of the Court. *A.-G. v. Jesus Coll.*, 29 B. 163; *A.-G. v. Marchant*, L. R. 3 Eq. 424; *Merchant Taylors v. A.-G.*, 11 Eq. 35; 6 Ch. 513; *A.-G. v. Wax Chandlers*, L. R. 6 H. L. 1.

When certain payments are directed out of the rents for charitable objects, leaving a surplus, the increase does not pass to the charitable objects. But where rents and profits of land are given to a corporation and certain fixed charitable payments are directed, which do not exhaust the whole, and there is no gift of the residue, the residue belongs to the corporation. *A.-G. v. Mayor of Bristol*, 2 J. & W. 291; *A.-G. v. Brasenose Coll.*, 2 Cl. & F. 295; *A.-G. v. Trinity College*, 24 B. 383.

*A fortiori*, if the surplus is expressly given to the corporation, though the amount of it be specifically mentioned by the testator, any increase, after the payments directed have been made, belongs to the corporation. *Southmolton v. A.-G.*, 5 H. L. 1; *Mayor of Beverley v. A.-G.*, 6 H. L. 310; *A.-G. v. Dean of Windsor*, 8 H. L. 369.

If, among the particular payments directed, some are not charitable, but are to be made to individuals and

cannot have been intended to abate, there is an additional argument that none of the particular payments were either to abate or to increase, and that the surplus, whatever it might be, was to go to the donees in trust. *A.-G. v. Cordwainers*, 3 M. & K. 534; *Mayor of Beverley v. A.-G.*, 6 H. L. 310.

On the other hand, if the surplus undisposed of is insignificant, and there is a direction, that the particular payments are to abate proportionately in the event of depreciation of the property, the inference arises, that they were in like manner to share proportionally in any increase. *Mercers' Co. v. A.-G.*, 2 Bl. N. S. 165.

### III. ADMINISTRATION OF CHARITABLE GIFTS.

When the bequest is to an existing charitable institution, the bequest is left to be administered as part of the funds of that institution. *Society for P. G. v. A.-G.*, 3 Russ. 142; *Wellbeloved v. Jones*, 1 S. & St. 43.

A gift to a charitable institution is administered by the institution.

But if the bequest is to an existing charitable institution for purposes other than the purposes for which it exists, the Court will administer the bequest by a scheme to be settled in Chambers, *ib.*

And, generally, wherever trustees are interposed by the testator, his object will be carried out by the Court by a scheme; but if no trustees are interposed the charity is administered under the Sign Manual. *Moggridge v. Thackwell*, 7 Ves. 36; *Raice v. Abp. of Canterbury*, 14 Ves. 364; *Kane v. Cosgrave*, 1 R. 10 Eq. 211.

A gift to trustees for charitable purposes is administered by the Court.

If, however, there is a gift to foreign trustees for charitable purposes in a foreign country and the trustees disclaim, the Court has no power to settle a scheme, and the gift fails. *A.-G. v. Sturge*, 19 B. 597; *New v. Bonaker*, 4 Eq. 655.

Gift to foreign trustees for a foreign charity.

Cases in which the discretion of the trustee is not interfered with.

And in some cases, where an annual sum has been directed to be given to a person for his life to be distributed in charity, the Court has refused to interfere with the discretion of the trustee by settling a scheme. *Bennett v. Honywood*, Amb. 708; *Waldo v. Cayley*, 16 Ves. 206; *Horder v. Earl of Suffolk*, 2 M. & K. 59.

#### IV. WHAT MAY NOT BE GIVEN TO CHARITY.

Statute of Mortmain, 9 Geo. II. c. 36.

By the so-called statute of Mortmain, 9 Geo. II. c. 36, it is enacted, that no hereditaments, corporeal or incorporeal, nor any personal estate to be laid out in the purchase of lands, shall be given for the benefit of any charitable uses whatsoever, except in the manner therein directed; and, in effect, all gifts by will of any lands, tenements, or other hereditaments, or of any estate or interest therein, or of any charge or incumbrance affecting or to affect any lands, tenements, or hereditaments, or of any stock, money, goods, chattels, or other personal estate, or securities for money, to be laid out or disposed of in the purchase of any lands, tenements, or hereditaments, or of any estate or interest therein, or of any charge or incumbrance affecting or to affect the same, to or in trust for any charitable uses whatsoever, are declared to be null and void.

Legacy duty.

If a charitable legacy is given free of duty, this is in effect a gift of the duty, which cannot therefore be paid out of impure personalty. *Wilkinson v. Barber*, 14 Eq. 96.

What is an interest in land within the statute.

Money to arise from sale of land.

A. The decisions are numerous as to what is an interest in land within the statute of *Mortmain*.

1. Money to arise from the sale of land directed by the testator, though the land is devoted to partnership purposes, is clearly within it. *Page v. Leapingwell*, 18 Ves. 463; *British Museum v. White*, 2 S. & St. 595; *Thornber v. Wilson*, 4 Dr. 350; *Incorporated Church Building*

*Society v. Coles*, 5 D. M. & G. 324; *Ashworth v. Munn*, 28 W. R. 965; 47 L. J. Ch. 747; 15 Ch. D. 563.

So is the purchase money for land contracted to be sold by the testator, but in respect of which he has a lien at his death, and also a premium payable to the testator in respect of a lease granted at a low rent. *Harrison v. Harrison*, 1 R. & M. 71; *Shepherd v. Beetham*, 6 Ch. D. 597.

2. On the question whether money to arise from the sale of land under an instrument other than the testator's will is within the Act, the cases are not entirely satisfactory.

Where land is given by a first testator on trust for sale, a gift of the proceeds by the will of a second testator is within the Act if the time for selling the land has not arrived at the death of the second testator, or if the land has not in fact been sold, and the second testator might have elected to take it as land. *Brook v. Badley*, 4 Eq. 106, 3 Ch. 672; *Lucas v. Jones*, 4 Eq. 73; *Attorney-General v. Harley*, 5 Mad. 321.

Where land is given by a first testator on trust for sale and division among several persons, a gift of the proceeds by the will of a second testator, which does not take effect till after the death of the first, is it seems within the Act, if the property has not in fact been sold before the second testator's death. *Marsh v. A.-G.*, 2 J. & H. 61, is overruled by *Brook v. Badley*, 3 Ch. 672; see *Ashworth v. Munn*, 15 Ch. D. 563.

The case has been held not within the Act, where leaseholds have been given on trust for sale to pay debts, and have been sold by the executors, in course of administration, after the death of the second testator, though the pure personalty was enough to satisfy the debts. *Shadbolt v. Thornton*, 17 Sim. 49; 13 Jur. 597; but this case is of very doubtful authority. See *Lucas v. Jones*, *supra*.

Lien for purchase money.

Money to arise from sale of land under a prior testator's will.

Crops,  
leaseholds.  
Mortgages  
and  
charges.

3. Further, within the Act are the proceeds of growing crops (a), leaseholds (b), money secured by mortgage of land (c), or charged upon land (d), including equitable mortgages (e) and mortgages of leaseholds (f). *Symonds v. Marine Society*, 2 Giff. 325 (a). *Johnston v. Swann*, 3 Mad. 457; *Paice v. Archbishop of Canterbury*, 14 Ves. 364; *Entwistle v. Davis*, 4 Eq. 272 (b). *White v. Evans*, 4 Ves. 21; *Corbyn v. French*, 4 Ves. 418; *Currie v. Pye*, 17 Ves. 462; *Paice v. Archbishop of Canterbury*, 14 Ves. 364 (c). *A.-G. v. Harley*, 5 Mad. 321; *Harrison v. Harrison*, 1 R. & M. 71 (d). *Alexander v. Brame*, 30 B. 153 (e). *Chester v. Chester*, 12 Eq. 444 (f).

Mortgage  
of real and  
personal  
property.

4. Though personalty may happen to be included in a mortgage given by will, the bequest will not be apportioned, nor will there be an apportionment, if the bequest is of a sum charged upon realty and personalty by a prior testator. *Brook v. Badley*, L. R. 3 Ch. 672; see *In re Hill's Trusts*, 16 Ch. D. 173.

But if a sum is secured by a promissory note and a mortgage by deposit, and the property mortgaged is worth only half the debt, the bequest is valid as regards the portion not secured by the mortgage. *Smith v. Sopwith*, W. N. 1877, 208.

Mortgages  
of rates  
and tolls.

5. So, too, mortgages of rates on occupiers of land leviable by distress (a), of poor rates (b), of turnpike tolls and harbour and dock rates (c), and Metropolitan Board of Works Consolidated Stock (d), are within the Act and cannot be given to charity. *Thornton v. Kempson*, Kay, 592; *Chandler v. Howell*, 4 Ch. D. 651 (a). *Finch v. Squire*, 10 Ves. 41 (b). *Knapp v. Williams*, 4 Ves. 429, n.; *King v. Wonstanley*, 8 Pr. 180; *Ion v. Ashton*, 28 B. 379; *Alexander v. Brame*, 30 B. 153; *Tyrrell v. Whinfield*, W. N. 1877, 99 (c). *Cluff v. Cluff*, 2 Ch. D. 222 (d).

The case of *Chandler v. Howell*, like some of the other cases above cited, may possibly be open to reconsideration,



but it is probably not correct to say that it is overruled by *Attree v. Hawe*, 9 Ch. D. 337.

6. Similarly, within the statute are arrears of interest due on a mortgage, and rent accrued due since the testator's death, on land contracted to be sold, and a judgment debt, if it is a charge upon realty. *Alexander v. Brame*, 30 B. 153; *Edwards v. Hall*, 11 Ha. 1; *Collinson v. Pater*, 2 R. & M. 344.

Arrears of rent, judgment charged on land.

7. A voluntary covenant to leave money by will to a charity is in substance a legacy, and is void if the testator leaves only real assets; if he leaves mixed assets, there will be an abatement in the proportion of the pure to the impure personalty. *Jeffries v. Alexander*, 7 D. M. & G. 525; 8 H. L. 594; *Fox v. Lowndes*, 19 Eq. 453.

Voluntary covenant to leave money is void as regards real assets.

8. Shares in companies, whether incorporated or not, are not within the statute, provided land is held by them only for the common purposes of the undertaking, and this is the case whether the shares are declared to be personal estate or not, provided the right of the shareholder is merely to call for a share of the profits, and not for a specific part of the land itself. *Walker v. Milne*, 11 B. 507; *Myers v. Perigal*, 11 C. B. 90; 2 D. M. & G. 599; *Edwards v. Hall*, 11 Ha. 1; 6 D. M. & G. 74; *Huyter v. Tucker*, 4 K. & J. 243; *Entwistle v. Davis*, 4 Eq. 272. *Morris v. Glyn*, 28 B. 218, cannot be considered law.

Shares in public companies are not within the statute,

It makes no difference that the company whose shares are in question has placed itself in the position of landlord, by letting its land to another company. *Linley v. Taylor*, 1 Giff. 67; 2 D. F. & J. 84.

But if the land is held in trust for each individual shareholder in proportion to his shares, so that each shareholder has a direct and definite interest in the land, the shares are within the statute. *Baxter v. Brown*, 7 M. & Gr. 198. See *Watson v. Spratley*, 10 Ex. 222.

unless each shareholder is entitled to a definite proportion of land.

9. Debenture stock, debentures and mortgage debentures

stock,  
mortgage  
debentures.

tures of railway companies charging the undertaking and tolls of the company are not within the Act. *Attree v. Howe*, 9 Ch. D. 337; *Holdsworth v. Davenport*, 3 Ch. D. 185; *In re Mitchell's Estate*; *Mitchell v. Moberly*, 6 Ch. D. 655, overruling *Ashton v. Lord Langdale*, 4 De G. & S. 402.

Bonds  
charged on  
police  
rates.

10. Bonds charged by justices on the police rates since 7 & 8 Vict. c. 33, under which Act justices no longer have power themselves to levy a rate, but issue a precept to the guardians of the unions for payment of the amount required, are not within the Act. *In re Harris*; *Jacson v. Governors of Queen Anne's Bounty*, 15 Ch. D. 561.

Arrears of  
rent due at  
the death.  
Tenants'  
fixtures.

11. Arrears of rent due at the testator's death (a), apportioned rent (b), a royalty on minerals (c), and tenants' fixtures (d), are not within the Act. *Edwards v. Hall*, 11 Ha. 1; 6 D. M. & G. 74 (a). *Thomas v. Stowell*, 18 Eq. 198 (b). *Brook v. Bradley*, 4 Eq. 106 (c). *Johnson v. Swann*, 3 Mad. 457 (d).

Money to  
be invested  
in land.

B. As to what is a gift of personalty to be laid out in the purchase of land or any interest therein within the Mortmain Act:

Money to  
be invested  
on real or  
mortgage  
security.

1. Money directed to be invested on real securities, or even merely on mortgage security generally, is within the Act. *Baker v. Sutton*, 1 Kee. 224.

The same is the case if the ultimate object of the bequest is investment in land, though other investments may be authorised in the meantime. *Mann v. Burlingham*, 1 Kee. 235; *A.-G. v. Hodgson*, 15 Sim. 146.

But the gift is valid if an option is left to trustees; for instance, if money is directed to be invested in real or other securities. *A.-G. v. Goddard*, T. & R. 348; *Graham v. Paternoster*, 31 B. 30; *Beaumont's Trusts*, 32 B. 191.

Bequest to  
pay off the  
mortgage  
debt of a  
charity.

2. A bequest of money to pay off a debt secured by mortgage, whether legal or equitable, of land belonging to a charity is void. *Corbyn v. French*, 4 Ves. 418; *Water-*

house v. *Holmes*, 2 Sim. 162; *In re Lynall's Trusts*, 12 Ch. D. 211.

But this is not the case where the debt is no charge upon the land. *Bunting v. Marriott*, 19 B. 163.

3. A gift to improve, repair or enlarge an existing charitable institution is valid. *Edwards v. Hall*, 11 H. 1; 6 D. M. & G. 74; *Hawkins' Trust*, 33 B. 570. Gift to improve, enlarge, or repair.

4. A gift to build a charitable institution is held *prima facie* to imply a direction to purchase land for the purpose, and is void under 9 Geo. II. c. 36. *Chapman v. Brown*, 6 Ves. 404; *A.-G. v. Parsons*, 8 Ves. 186; *Pritchard v. Arbouin*, 3 Russ. 456; *A.-G. v. Davies*, 9 Ves. 535; *Martin v. Wellsted*, 2 W. R. 657; *Longstaff v. Rennison*, 1 Dr. 28; *Watmough's Trusts*, 8 Eq. 272; *Hawkins v. Allen*, 10 Eq. 246; *Pratt v. Harvey*, 12 Eq. 544. Gift to build a charitable institution is void.

A gift for the erection of a charitable institution does not become valid because it is made to a corporation which has power to hold land in mortmain, and, in fact, possesses land available for the purposes of the bequest. *In re Cox*; *Cox v. Davie*, 7 Ch. D. 204.

5. If, however, an option is given to the trustees either to build a charitable institution or bestow the money in some other manner which is legal, the bequest is good as regards the legal purpose. *Sorresby v. Hollins*, 9 Mad. 221; *A.-G. v. Whitchurch*, 3 Ves. 141; *Incorporated Society v. Barlow*, 3 D. M. & G. 120; 17 Jur. 217; *Mayor of Faversham v. Ryder*, 18 B. 318; 5 D. M. & G. 350; *Edwards v. Hall*, 11 Ha. 1; 6 D. M. & G. 74; *Dent v. Allcroft*, 30 B. 335; *University of London v. Yarrow*, 1 De G. & J. 72. Discretion to build or apply the money in some legal manner.

And, on similar principles, a bequest of pure and impure personalty to such charities as trustees may select is good, since the power can be exercised in favour of charities exempt from the law of mortmain. *Lewis v. Allenby*, 10 Eq. 668.

Gift to  
"estab-  
lish" a  
charity.

6. A direction to "establish" would, it seems, *primâ facie* imply building, and come under the same rule as a bequest for building. *A.-G. v. Hodgson*, 15 Sim. 146; *Longstaff v. Rennison*, 1 Dr. 28; *Re Clancy*, 16 B. 295; *A.-G. v. Hall*, 9 H. 647; *Dunn v. Bownas*, 1 K. & J. 591; *Tatham v. Drummond*, 4 D. J. & S. 484.

But, of course, the word may be used in such a context as to exclude building. *A.-G. v. Williams*, 2 Cox, 387; *Hill v. Jones*, 2 W. R. 657.

And the fact, that an annual sum only is given to establish a school, would apparently go to show that the testator did not contemplate building. *Hartshorne v. Nicholson*, 26 B. 58.

The same is the case with an annual sum given to "provide" a school, which may only mean that a school is to be hired. *Johnston v. Swann*, 3 Mad. 457; *Crafton v. Frith*, 20 L. J. Ch. 198; 15 Jur. 737.

A gift to "support or found" a school is valid. *In re Hedgman*; *Morley v. Croxon*, 8 Ch. D. 156.

A bequest to "found" a chapel implies building. *Hopkins v. Phillips*, 3 Giff. 182.

Gift to  
endow a  
charity.

On the other hand, a gift to "endow" would not, *primâ facie*, authorise building, though the word may be so used as to involve it. *Salisbury v. Denton*, 3 K. & J. 529; *Edwards v. Hall*, 11 Ha. 1; *Sinnott v. Herbert*, 7 Ch. 233; *Kirkbank v. Hudson*, 7 Pr. 212.

Evidence  
of inten-  
tion that  
the testa-  
tor did not  
contem-  
plate the  
purchase  
of land.

7. But, even though the object of the gift may *primâ facie* imply the purchase of land, it may appear that the testator had no such intention. He may have contemplated the building as to be erected either on land already in mortmain, or on land to be provided after his death from some other source.

(a.) Thus, if the testator contemplated land already in mortmain, a gift to build a charitable institution is good. This will be the case:—

- (i.) If land already in mortmain is expressly referred to in the will: *Glubb v. A.-G.*, Amb. 373; *Brodie v. Duke of Chandos*, 1 B. C. C. 444 n. Land in mortmain referred to expressly,

If it is uncertain, whether the land upon which the testator directs the money to be laid out is already in mortmain or not, an inquiry will be directed. *Champney v. Davy*, 11 Ch. D. 949.

- (ii.) If land already in mortmain is impliedly referred to, as by a direction to build in such manner as is consistent with law. *Dent v. Allcroft*, 30 B. 335; *Sewell v. Crewe Read*, L. R. 3 Eq. 60. by implication,
- (iii.) External evidence may be adduced in order to show that the testator must have contemplated land in mortmain, though as to the exact amount of evidence necessary for this purpose the cases are not quite consistent. *A.-G. v. Hyde*, Amb. 751; *Giblett v. Hobson*, 3 M. & K. 517; *Booth v. Carter*, L. R. 3 Eq. 757; *Cresswell v. Cresswell*, 6 Eq. 69. by external evidence.

(b.) When the testator intends the buildings to be erected on land to be supplied from some other source after his death :—

- (i.) It is clear, that a direct inducement offered to any person to give land for the purpose of the building, as, for instance, a bequest to A. to build if he will give the land, is bad. *A.-G. v. Davies*, 9 Ves. 535. Inducement to give land.
- (ii.) If the trustees are directed to beg the land from some person, but their own implied power to purchase remains, the bequest is bad. *Mather v. Scott*, 2 Kee. 172. Direction to beg land.
- (iii.) Where the bequest is to build, with an express direction, that land is not to be bought for the purpose, the bequest is valid, whether made conditional upon land being provided, or without any condition. *Henshaw v. Atkinson*, 3 Mad. 306; *A.-G. v. Williams*, 2 Cox, 387; *Cawood v. Thompson*, 1 Sm. & G. Direction not to buy land.

409; *Philpott v. Governors of St. George's Hospital*, 6 H. L. 338 (overruling *Trye v. Corporation of Gloucester*, 14 B. 173); *Chamberlayne v. Brockett*, 8 Ch. 206.

Bequest to a charity, the object of which is to acquire land.

8. Upon similar principles, a bequest to the trustees of a charity which exists only for the purchase of land is void. *Widmore v. Woodroffe*, Amb. 636; *Middleton v. Clitheroe*, 3 Ves. 734; *Denton v. Lord J. Mannors*, 25 B. 38; 2 De G. & J. 675.

On the other hand, it is good if it exists for the purchase of land or other objects. *Incorporated Society v. Barlow*, 3 D. M. & G. 120; *Carter v. Green*, 3 K. & J. 591; *Wilkinson v. Barber*, 14 Eq. 96.

9. A bequest of money to be employed in enlarging or improving a charitable object attempted to be created by a testator, fails, if the original object is invalid. *A.-G. v. Hinaman*, 2 J. & W. 270; *Smith v. Oliver*, 11 B. 481; *Crump v. Playfoot*, 4 K. & J. 479; *Green v. Britten*, 42 L. J. Ch. 187; *In re Cox*; *Cox v. Davie*, 7 Ch. D. 204.

Bequest for foreign charity.

10. A bequest of the proceeds of sale of land in England to be laid out in the purchase of land for charitable purposes in a country where land may be well given to charity, is void. *Curtis v. Halton*, 14 Ves. 537; *A.-G. v. Mill*, 3 Russ. 328; 5 Bl. N. C. 593; 2 Dow. & Cl. 393.

But the Statute of Mortmain leaves bequests of money to be laid out in the purchase of land for charitable purposes in other countries untouched. *Mackintosh v. Tournsend*, 16 Ves. 330; see *Whicker v. Hume*, 7 H. L. 124.

#### C. Exceptions from the Statute of Mortmain.

Universities of Oxford and Cambridge, and Eton, Winchester, and Westminster excepted.

The Universities of Oxford and Cambridge, and the Colleges of Eton, Winchester and Westminster, are excepted from the operation of the Mortmain Act. But this exception only authorises devises to these colleges for all or some of the purposes for which they exist, and not upon trust for other charitable objects. *A.-G. v. Tancred*, 1 Ed. 10;

1 W. Bl. 90; Amb. 351; *A.-G. v. Whorwood*, 1 Ves. 534; *ted from the Act*  
*A.-G. v. Munby*, 1 Mer. 327.

And if there is a good devise of lands to a college for charitable objects, which the college refuses to accept, the object will be carried out *cy prés*. *A.-G. v. Andrew*, 3 Ves. 633.

Before the Wills Act, it seems that a devise to a college Whether a college takes the legal estate, did not carry the legal estate, notwithstanding *Benet College v. Bishop of London*, 2 W. Bl. 482, which was decided upon an erroneous interpretation of the statute 43 Eliz. c. 4, that statute being merely remedial and not intended to authorise what was illegal before. See *Incorporated Society v. Richards*, 1 D. & War. 258.

Whether a devise to a college since the Wills Act would carry the legal estate seems doubtful. See p. 92.

The fact that a charity is empowered by Act of Parliament to hold lands does not entitle a testator to devise lands to it. *Robinson v. Governors of London Hospital*, 10 Ha. 19; *Nethersole v. School for the Indigent Blind*, 11 Eq. 1; *Chester v. Chester*, 12 Eq. 444. In what cases charities empowered to hold lands may take by devise.

But where charities are empowered to acquire lands by will, testators are of course entitled to devise lands to them. *Perring v. Traill*, 18 Eq. 88.

But it seems that such a power to take lands by devise, would not necessarily authorise a bequest of money secured on mortgage. *Chester v. Chester*, *supra*.

An Act passed before the Act 9 Geo. II. c. 36, and enabling a charitable corporation to take lands without a licence in mortmain, by authorising testators to devise lands to the corporation, does not exempt the corporation from the operation of 9 Geo. II. c. 36. *Luckraft v. Pridham*, 6 Ch. D. 205. Bequest of money to be employed on land devised to charity by the testator.

Under 42 Geo. III. c. 116, s. 50, money may be given by will or otherwise for redeeming the land tax on lands settled to charitable uses. Redemption of land tax.

Under section 162 of the same Act land tax redeemed or purchased may be given by deed or will for the augmentation of any living.

Statute 43  
Geo. III.  
c. 108.

The statute 43 Geo. III. c. 108, authorises the devise of lands not exceeding five acres, or of goods or chattels to the amount of 500*l.* for erecting, repairing, or providing any church or chapel where the Liturgy of the Church of England is used, or any mansion-house for any minister of the said Church, and other similar purposes.

Under this Act a bequest of 500*l.* towards building a church, if the testator survives the making of the will three months, is good. *Dison v. Barlow*, 3 Y. & C. Ex. 677; *Girdlestone v. Creed*, 10 Ha. 480.

The Act, however, does not authorise a devise of lands to be sold and the proceeds to be applied towards the purposes of the Act. *Incorporated Church Building Society v. Coles*, 1 K. & J. 145; 5 D. M. & G. 324.

The effect of the Act is that under a bequest towards building a church the legacy will be apportioned between the pure and impure personalty, and be paid out of pure personalty to the extent of its proportion, and out of the impure personalty to the extent of 500*l.* *Sinnett v. Herbert*, 7 Ch. 232; *Champney v. Davy*, 11 Ch. D. 949.

Endow-  
ment of  
districts  
for  
spiritual  
purposes.

Under 6 & 7 Vict. c. 37, s. 9, the Ecclesiastical Commissioners may constitute districts for spiritual purposes, and by section 22 land or money may be given by deed or will for the endowment of the minister of a district, or for providing a church or chapel under the Act.

Under this Act a direction to apply a sum for the purposes authorised by the Act, if the object can be legally carried out within twenty-one years from the testator's death, is valid, if a district is constituted within the stated period, though no district has been constituted at the testator's death. *Baldwin v. Baldwin*, 22 B. 419.



A list of charities excepted from the Mortmain Act will be found in Tudor's Real Property Cases, p. 508.

The Statute of Mortmain cannot be avoided by a secret trust in favour of a charity. *Russell v. Jackson*, 10 Ha. 204. Secret trust of land in favour of charity is bad, but the devisee takes the legal estate.

In such a case, however, the devisee takes the legal estate. *Sweeting v. Sweeting*, 12 W. R. 239.

Where land is devised on trust for a person for life with remainder to charity, the legal estate is well devised for life. *Young v. Grove*, 4 C. B. 668.

The legal estate passes when the trust is for charity, and for other objects which are valid. *Doe d. Chidgey v. Harris*, 16 M. & W. 517, 518.

But a devise of lands on an express trust for charity only is void, as regards the legal estate as well, by the statute 9 Geo. II. c. 36. *Doe d. Burdette v. Wrighte*, 2 B. & Ald. 710.

## CHAPTER XXVII.

SUCCESSIVE AND CONCURRENT INTERESTS, JOINT  
TENANCY AND TENANCY IN COMMON.

## I. DEVISE TO A CLASS IN TAIL.

Devise to  
a class in  
tail gives  
concurrent  
interests,

IN some cases the question has arisen whether the gift is to several persons concurrently, or whether they are intended to take successively; thus a devise to the sons of a person in tail is, *prima facie*, a gift to a class. *De Windt v. De Windt*, L. R. 1 H. L. 87; *Surtees v. Surtees*, 12 Eq. 400.

unless  
there is an  
intention  
expressed  
to keep the  
property  
together in  
one line of  
enjoy-  
ment.

But, if there is a general intention manifest to keep the estates together in a single line of enjoyment, the members of the class will take successively. *Cradock v. Cradock*, 4 Jur. N. S. 626, 656; *Allgood v. Blake*, L. R. 7 Ex. 339; *ib.* 8 Ex. 160.

## II. GIFTS TO A PARENT AND CHILDREN.

Gift to  
a parent  
and chil-  
dren gives  
them  
concurrent  
interests.

IN the same way a gift to a parent and children is *prima facie* a gift to them concurrently. *Mason v. Clarke*, 17 B. 126; *Sutton v. Torre*, 6 Jur. 234; *Wilson v. Madison*, 2 Y. & C. C. 372; *Beales v. Crisford*, 13 Sim. 592; *Newill v. Newill*, 12 Eq. 432; 7 Ch. 253. See *Cape v. Cape*, 2 Y. & C. Ex. 543.

The fact, that the gift is to the parent in trust for herself and her children, is not sufficient to show that they are not to take concurrently. *Newill v. Newill*, 7 Ch. 253. See *Curtis v. Graham*, 12 W. R. 998. *Ward v. Grey*, 26 B. 485, probably goes beyond the present tendency of the Court.

What is a  
contrary  
intention.

But, if there is anything to show, that the parent is to take a different interest from that of the children, he will take for life, with remainder to the children.

1. If the bequest is to A. and his children as tenants in common, if more than one, showing that the tenancy in common is to apply to children only, the father takes for life. *Doe d. Davy v. Burnsall*, 6 T. R. 30; 1 B. & P. 215, where issue must have meant children by the force of the gift over in default of issue of such issue. See *Doe d. Gilman v. Elvey*, 4 East, 313.

Words of distribution applied to the children only.

2. A devise to A. and his children and the heirs of the parent and children, gives a joint estate in fee, or an estate tail to the parent, according as there are or are not children living at the time of the devise. *Oates d. Hatterly v. Jackson*, 2 Str. 1172; *Underhill v. Roden*, 2 Ch. D. 494.

Words of limitation applied to the children only.

But a devise to A. and his children, and the heirs of the children, would give A. an estate for life with remainder to his children. *Jeffery v. Honeywood*, 4 Mad. 398, was decided on this ground, though it would seem the word heirs referred to the parent as well as the children.

3. If the bequest is to a father and his children, and there is a desire expressed that the whole fund should be settled or secured, a term which would have no meaning as applied to the father's interest as joint tenant, the father takes for life. *Vaughan v. Marquis of Headfort*, 10 Sim. 639; *Combe v. Hughes*, 14 Eq. 415.

Settlement directed of the whole fund.

If a continuing trust is created, which is contemplated as outlasting the parent's life, there is room for a similar argument in favour of a life interest in the parent. *Ogle v. Corthorn*, 9 Jur. 325.

4. Whether, where the gift is to the separate use of the mother, it will be considered a sufficient indication of intention to cut the interest of the parent down to a life interest is not certain. On the whole, the better opinion seems to be, that where the words creating the separate use apply to the whole fund or legacy, it will be construed as giving the mother a life interest. *Newman v. Nightin-*

Gift of the whole fund to the separate use.

*gale*, 1 Cox, 341; *French v. French*, 11 Sim. 257; *Bain v. Lescher*, 11 Sim. 397; *Froggatt v. Wardell*, 3 De G. & S. 685; *Dawson v. Bourne*, 16 B. 29; *Jeffery v. De Vitre*, 24 B. 296; *Scott v. Scott*, 11 Ir. Ch. 114; *Ogle v. Corthorn*, 9 Jur. 325, in which case the Vice-Chancellor Wigram thought that a gift to the separate use was conclusive against the children participating with their mother. *Combe v. Hughes*, 14 Eq. 415.

On the other hand, the cases of *De Witte v. De Witte*, 11 Sim. 41, and *Bustard v. Saunders*, 7 B. 92 (which, however, only followed *De Witte v. De Witte*), are inconsistent with this rule.

Separate use attached to parent's interest or to interests of all.

If the interest of the mother alone is given to her separate use, or the separate use attaches to the interests of all alike, no argument in favour of a life estate can be founded upon the separate use. *Fisher v. Webster*, 14 Eq. 283; *Newsom's Trusts*, 1 L. R. Ir. 373.

The same is the case, if her interest only is directed to cease on marriage. *Izod v. Izod*, 11 W. R. 452.

Division of the whole fund directed at a particular time.

5. If upon the marriage of their mother the fund is to be divided among the children, this affords an argument, that it is not to be divided before, and the mother takes for life or till marriage. *Mill v. Mill*, 1 R. 9 Eq. 104; *ib.* 11 Eq. 158.

Gift over of the entire fund if there are no children.

6. If the whole fund is contemplated as remaining undisposed of, if there are no children, if there is a gift over for instance in default of children, the same construction is adopted. *Audsley v. Horn*, 26 B. 195; 1 D. F. & J. 226. See *Lampley v. Blower*, 3 Atk. 396.

Children contemplated as taking the whole fund.

7. If the children are contemplated as taking shares in the whole fund by a direction, for instance, that if there is but one child the whole is to go to that child, since the children are to take the whole, the parent to take anything must take a life interest. *Garden v. Poulloney*, Amb. 499; 2 Ed. 323; *Audsley v. Horn*, 26 B. 195; 1 D. F. & J. 226.

8. If the bequest is such, as expressly to include all the children of the parent, and not merely those in being at the period of distribution, it will be construed to give a life estate to the parent, with remainder to the children, since it is a singular intention to impute to the testator that the parent's interest in the estate should continually diminish on the birth of a new child. *Jeffery v. De Vitre*, 24 B. 296; *Jeffery v. Honeywood*, 4 Mad. 398.

Express gift to afterborn children.

9. If the legacy is payable in part at once, and in part at a future period, the parent will take for life, as otherwise different classes of children might take the two portions. *Morse v. Morse*, 2 Sim. 485.

Part of the fund payable at a future period.

10. If in the event of the mother's death before the testator the children are to take unequal shares, the presumption of joint tenancy is apparently rebutted. *Armstrong v. Armstrong*, 7 Eq. 518.

Effect of a gift to the children in unequal shares in certain events.

11. If the children are contemplated as not enjoying the property till after their mother's death, by being called heirs for instance, the parent takes for life only. *Crawford v. Trotter*, 4 Mad. 36; *Ogle v. Corthorn*, 9 Jur. 325; *Wilson v. Vansittart*, Amb. 561.

Words implying that children are not to take till their parent's death.

12. There may be a reference to another gift, to assist the Court in giving the parent a life interest. *French v. French*, 11 Sim. 257; *In re Owen's Will*, 12 Eq. 316.

Reference to other gifts.

13. An executory trust for A. and her children will be settled on A. for life, and afterwards for her children. *In re Bellasis' Trust*, 12 Eq. 218.

Executory trust.

### III. JOINT TENANCY, TENANCY IN COMMON AND BY ENTIRETIES.

#### A. What creates a joint tenancy.

A gift to two persons or to a class with words of limitation, *prima facie*, constitutes a joint tenancy between them.

Gift to several with words of limitation is a joint tenancy.

The rule, that the interests of joint tenants must vest

Interests

of joint tenants need not vest at the same time. "All and every."

at the same time, does not apply to estates raised by use, or to wills. *Macgregor v. Macgregor*, 1 D. F. & J. 63.

Thus a gift to the children or to all and every the child or children of A. creates a joint tenancy between them. *Kenworthy v. Ward*, 11 Ha. 196; *Morgan v. Britten*, 13 Eq. 28.

A devise to two persons who may intermarry, though they may both be married already, and the heirs of their bodies, makes them joint tenants in tail. Co. Lit. s. 25, p. 25 b.

If an appointment under a special power is made in favour of A. and B. as joint tenants, and A. is not an object of the power, B. takes only a moiety, and the other moiety goes as in default of appointment. *In re Kerr's Trusts*, 4 Ch. D. 600.

A joint tenancy in income is severed as regards each instalment as soon as it becomes payable. *Walmesley v. Foachall*, 40 L. J. Ch. 28.

B. Joint life estates several inheritances.

Intermediate between cases of joint tenancy and of tenancy in common falls a class of cases, in which, in order to give effect to the whole devise, joint estates for life and several inheritances are given.

A devise to several persons who cannot marry, and the heirs of their bodies, gives them joint estates for life with several inheritances in tail. *Ferne*, C. R. 35; *Cook v. Cook*, 2 Vern. 545; *Forrest v. Whiteway*, 3 Ex. 367; *Edwards v. Champion*, 3 D. M. & G. 202, 214; *Tufnell v. Borrell*, 20 Eq. 194.

A devise to a man and two women, or to two men and one woman, and the heirs of their bodies gives them joint estates for life and several inheritances. Co. Lit. 25 b.

A devise to two husbands and their wives, and the heirs of their bodies, gives joint estates for life, and several inheritances; the one husband and wife the one moiety, the other husband and wife the other moiety. Co. Lit. 25 b.

A devise to several and the heirs of their respective <sup>Force of word re-</sup> bodies, gives joint estates for life and several inheritances. <sup>spective.</sup> But a devise to children and the heirs of their bodies respectively, gives several estates in tail. *In re Tiverton Market Act; Ex parte Tanner*, 20 B. 374.

In the case of real estate devised to several and their <sup>Devise to several in</sup> heirs a similar principle has in several cases been followed, <sup>fee.</sup> words of severance being referred to the inheritance, leaving the life interests joint.

This construction is assisted if there is an express limitation to the survivor or such words as jointly are used. *Barker v. Giles*, 2 P. W. 280; 3 B. P. C. 297; see *Cookson v. Bingham*, 3 D. M. & G. 668.

Thus a devise to A. and B. equally as joint tenants, and their several and respective heirs, gives joint estates for life with several inheritances. *Doe d. Littlewood v. Green*, 4 M. & W. 229.

A devise to several and their heirs respectively creates a tenancy in common. *Torret v. Frampton*, Styles, 434.

It has been said, however, that a devise to several and their respective heirs creates joint estates for life and several inheritances. See *In re Tiverton Market Act; Ex parte Tanner*, 20 B. 374.

This rule, however, does not extend to personalty, so that a bequest of personalty to several, and to each of their respective heirs, executors and administrators, will create a tenancy in common. *Gordon v. Atkinson*, 1 De G. & S. 478.

A devise to several and the survivor and the heirs of such survivor gives joint life estates with a contingent remainder in fee to the survivor. *Vick v. Edwards*, 3 P. Wms. 371; *Re Harrison*, 3 Anst. 886; *Fearne*, C. R. 357-359.

But a devise to several and the survivor their heirs and assigns for ever gives joint estates in fee. *Doe v. Sotheran*, 2 B. & Ad. 628, 635.

## C. What creates a tenancy in common.

The Court leans to a tenancy in common.

1. The Court leans towards a tenancy in common, and will prefer it, when there is a doubt, or the testator has given the legatees a choice between a joint tenancy and tenancy in common. *Booth v. Alington*, 3 Jur. N. S. 835; 27 L. J. Ch. 117; 5 W. R. 811; *Oakley v. Wood*, 16 L. T. N. S. 450; 37 L. J. Ch. 28.

Jointly and equally.

So in several cases where there have been such words as "jointly and equally" the Courts have held the gift a tenancy in common. *Ettricke v. Ettricke*, Amb. 656; *Perkins v. Baynton*, 1 B. C. C. 118.

What words create a tenancy in common.

2. Words of division or distribution, such as "to be divided," or "equally," or "between," or "amongst," or "respectively," make a tenancy in common. *Vanderplank v. King*, 3 Ha. 1; *Campbell v. Campbell*, 4 B. C. C. 15; *A.-G. v. Fletcher*, 13 Eq. 128. See *Re Moore's Settlement Trusts*, 10 W. R. 315.

Part or share.

And the use of the word "share," or similar words, with reference to the interest of the legatees, or even the word "participate," has the same effect. *Ive v. King*, 16 B. 46; *Paterson v. Rolland*, 28 B. 347; *Robertson v. Fraser*, 6 Ch. 696. See *Alloway v. Alloway*, 4 D. & War. 380.

Effect of a gift at twenty-one.

3. And it has been held, that where there is a gift to a class at twenty-one, so that some may take vested and others contingent interests, they take as tenants in common. *Woodgate v. Unwin*, 4 Sim. 129; *Hand v. North*, 12 W. R. 229; 10 Jur. N. S. 7.

Incidents inconsistent with a joint tenancy.

4. If there are any incidents attached to the gift inconsistent with a joint tenancy, it will be construed as a tenancy in common:

If, for instance, one of the objects of the gift is to take the interest of the other, not merely on the death of the latter, but on his death without issue, or on some other contingency. *Ryves v. Ryves*, 11 Eq. 539.

Of course a gift over of the interest of one joint tenant



in certain events to a third person can have no such effect. *Edwards v. Jones*, 33 B. 348; see *Yarrow v. Knightly*, 8 Ch. D. 736.

5. Where there is a power to appoint to persons, which would authorise a tenancy in common, the Court, if compelled to exercise the power, will make the legatees tenants in common. *White's Trusts*, Joh. 656; *Phene's Trusts*, 5 Eq. 346; *In re Susanni's Trusts*, 47 L. J. Ch. 65; see *Armstrong v. Armstrong*, 7 Eq. 519.

6. It would seem, that where a clear executory trust is created by will, for instance, by a direction to make a settlement upon a person and her children, the children would take as tenants in common. *Head v. Randall*, 2 Y. & C. C. 231; *Stanley v. Jackman*, 23 B. 450. See *Taggart v. Taggart*, 1 Sch. & L. 84; *Synge v. Hales*, 2 Ba. & Be. 499.

At any rate, this is clearly the case if the ordinary powers and trusts are directed to be inserted in the settlement. *Mayn v. Mayn*, 5 Eq. 150.

But a mere direction to secure a fund in favour of a class will not make them tenants in common. *White v. Briggs*, 2 Ph. 583; *Owen v. Penny*, 14 Jur. 359.

7. If there is a gift to parents creating a tenancy in common, and children are substituted for parents dying, the children of each parent take as joint tenants among themselves. *Penny v. Clarke*, 1 D. F. & J. 425; *Macgregor v. Macgregor*, 1 D. F. & J. 63; *Hodgson's Trusts*, 1 K. & J. 178; *Coe v. Bigg*, 1 N. R. 536; *Lanphier v. Buck*, 2 Dr. & Sm. 484.

But this does not apply if the words of division must be applied to the children as well. *Lyon v. Coward*, 15 Sim. 287; *Shepherdson v. Dale*, 12 Jur. N. S. 156; *Hodges v. Grant*, 4 Eq. 140.

8. If there is a gift to parents in joint tenancy and a direction, that the children of parents dying are to stand

Power to  
appoint to  
persons as  
tenants in  
common.

Executory  
trust in  
favour of a  
parent and  
children.

Issue sub-  
stituted  
for parents  
take as  
joint  
tenants  
between  
them-  
selves,

unless  
there are  
words of  
severance  
applicable  
to the  
issue.

Severance  
of joint

tenancy  
as regards  
the share  
of issue  
substituted for  
their  
parent.  
Tenants  
by entire-  
ties.

in the place of the parents and take their shares, there is with regard to the *stirps* of children so taking a severance of the joint tenancy. *Heasman v. Pearse*, 7 Ch. 275.

#### D. Tenants by entireties.

Where real or personal property is given to a husband and wife, though with a declaration that they are to be joint tenants, they hold by entireties, and on the death of one the other takes not *jure accrescendi*, but by virtue of the original limitation. Co. Lit. 187 a; *Kelly v. Pollock*, 6 Ir. C. L. 367.

Real  
estate.

In the case of real estate held by entireties, neither husband or wife can alienate the property without the consent of the other, nor sever the tenancy. Co. Lit. 187 a, b; *Doe v. Parratt*, 5 T. R. 652.

Person-  
alty.

In the case of personalty the right of the wife is destroyed, if the husband reduces the property with possession, and the wife has no equity to a settlement. *Atcheson v. Atcheson*, 11 B. 485; *Ward v. Ward*, 14 Ch. D. 506. *In re Bryan*; *Godfrey v. Bryan*, 14 Ch. D. 516.

It would seem, however, that the Court would preserve the wife's right by survivorship by preventing the husband from alienating the property during her life. *Atcheson v. Atcheson*, 11 B. 485.

Chattels  
real.

In the case of chattels real held by entireties, the husband can destroy his wife's right by survivorship by alienating the chattels real. In the report of the case of *Grute v. Locroft*, Cro. El. 287, usually cited as an authority on this question, the tenancy is stated to have been joint and not by entireties. It may have been a joint tenancy created before marriage. See 2 Preston, Abst. 57; Foster on Joint Ownership, 62.

## CHAPTER XXVIII.

## ESTATES IN FEE AND IN TAIL.

## I. WORDS OF LIMITATION PROPER TO PASS THE FEE.

1. WORDS of limitation were never necessary to pass the fee in a devise of lands held in ancient demesne. *Winch*. 1.

A devise to a man and his heirs gives him the fee, though he may be a bastard, and can have, therefore, only heirs of his body. *Idle v. Cook*, 1 P. Wms. 78. Devise to A. and his heirs.

A devise to A. and his lawful heirs carries a fee. *Simpson v. Ashworth*, 6 B. 412; *Matthews v. Gardiner*, 17 B. 254. Devise to A. and his lawful heirs.

So, too, a devise to a man, his executors and administrators, gives him the fee. *Rose d. Vere v. Hill*, 3 Burr. 1881. Devise to A., his executors, and administrators.

A devise of gavelkind land to a man and his eldest heir passes the fee. *Co. Lit.* 27 a.

2. The testator may, however, show by explanatory expressions that he used the word heirs as equivalent to heirs of the body. *Doe d. Jearrod v. Banister*, 7 M. & W. 292; *Jenkins v. Hughes*, 8 H. L. 571; see, too, 4 Mad. 67; *Biddulph v. Lees*, E. B. & E. 289; 6 W. R. 592; 7 W. R. 309. The testator may show that he meant by heirs heirs of the body.

A devise to the first and other sons of a tenant for life successively and their respective heirs according to priority of birth, followed by a gift over in default of such issue, will give the sons successive estates tail. *Hennessey v. Bray*, 33 B. 96; *Lewis d. Ormond v. Waters*, 6 East, 337.

Effect of  
gift over  
in default  
of heirs to  
a collateral  
heir.

3. Heirs will be held equivalent to heirs of the body, if there is a limitation over in default of heirs to a person who may be, or to several persons, some of whom may be collateral heir or heirs to the first taker, the limitation over to a collateral heir showing that by heirs the testator meant heirs of the body. *Webb v. Hearing*, Cro. Jac. 415; *Harris v. Davis*, 1 Coll. 416.

The rule does not apply where the gift over is on failure of issue; therefore, a gift to several in fee, and if they die without issue to a collateral heir will, since the Wills Act, give a fee with an executory devise over, as it would before the Act have given an estate tail by force of the gift over being in default of issue, not because it was to a collateral heir. See *Gwynne v. Berry*, 1 R. 9 C. L. 494; *Fay v. Fay*, 5 L. R. Ir. 274.

Effect of a  
gift over in  
default of  
issue upon  
a prior  
devise in  
fee.

4. If there is a devise to A., which gives A. the fee, either by express limitation or by construction, followed by a gift over if he dies without heirs of the body or issue, if these words import an indefinite failure of issue, A.'s estate is cut down to an estate tail. *Tracy v. Glover*, cit. 3 Leon. 130; *Denn v. Slater*, 5 T. R. 335; *Dansey v. Griffiths*, 4 Mau. & S. 61; *Tenny v. Agar*, 12 East, 253; *Morgan v. Morgan*, 10 Eq. 99.

If, however, the failure of issue is not an indefinite failure of issue, there is no necessity for this construction, and the gift over will take effect as an executory devise. *Right v. Day*, 16 East, 67; *Doe v. Frost*, 3 B. & Ald. 546; *Parker v. Birks*, 1 K. & J. 156; *Ex parte Davies*, 2 Sim. N. S. 114; *Blinston v. Warburton*, 2 K. & J. 400; *McEnally v. Wetherall*, 15 Ir. C. L. 502; *Coltsman v. Coltsman*, L. R. 3 H. L. 121.

It appears that in a deed a limitation over upon death without such issue or without leaving issue will not cut down a previous limitation in fee to an estate tail. *Idle*

v. *Cook*, 1 P. Wms. 70; *Olivant v. Wright*, 9 Ch. D. 646; see *Morgan v. Morgan*, 10 Eq. 99.

Words of limitation appear to be unnecessary even in a deed, to pass the absolute interest in an estate *pur autre vie*. *Brenan v. Boyne*, 16 Ir. Ch. 87.

## II. WHERE THE FEE WILL PASS WITHOUT WORDS OF LIMITATION.

### A. Wills before the Wills Act.

In wills before the Wills Act a devise of lands to A. without words of limitation gave only an estate for life. But the Courts are anxious to lay hold of any indication of intention, that more than a life estate was meant to pass. In what case a fee passes without words of limitation in wills before the Wills Act.

The words "freely to be possessed and enjoyed" will not pass the fee. *Doe d. Ashby v. Baines*, 2 C. M. & R. 23.

1. But the fee passes by the words property or estate, even if accompanied by words of locality. *Doe d. Pottow v. Fricker*, 6 Ex. 510; *Bentley v. Oldfield*, 19 B. 225; *Phillips v. Allen*, 7 Sim. 446; *White v. Coram*, 3 K. & J. 652; *Coltsman v. Coltsman*, L. R. 3 H. L. 121. Devise of property or estate,

A mere recital, however, of an intention to dispose of all the testator's estates or property is not enough to pass the fee, unless these words are brought down into and incorporated with the devise. *Denn v. Gaskin*, 2 Cowp. 657; *Doe v. Allen*, 8 T. R. 497.

2. So, too, the fee passes by the words moiety, part, share, or similar words. *Doe d. Atkinson v. Fawcett*, 3 C. B. 274; *Paris v. Miller*, 5 Mau. & S. 408; *Manning v. Taylor*, L. R. 1 Ex. 235. moiety, part, or share.

But the moiety, part, or share must exist as such at the date of the devise. *Colclough v. Colclough*, 1 R. 4 Eq. 263.

The rule does not apply to the case of a series of

formal limitations, so as to affect one gift in the midst of several life estates. *Re Arnold's Estate*, 33 B. 163.

Effect of  
a charge  
upon the  
devisee.

3. A fee passes, if there is a charge on the devisee personally, or in respect of the property devised, whether the charge be a sum in gross or an annual sum. *Matthews v. Windross*, 2 K. & J. 406; *Pickwell v. Spencer*, L. R. 6 Ex. 190; *ib.*, 7 Ex. 105.

It is immaterial, whether the payment is upon a contingency or not. *Doe d. Thorne v. Phillips*, 3 B. & Ad. 753; *Abrams v. Winshup*, 3 Russ. 350.

And a fee has been held to pass, where a mere discretionary trust was imposed upon the devisee. *Lloyd v. Jackson*, L. R. 1 Q. B. 571; *ib.*, 2 Q. B. 269.

But the fee will not pass, if sums are merely charged upon the land generally and not upon the land in the hands of the devisee; thus a devise after or subject to certain payments will not carry the fee. *Moor v. Denn d. Mellor*, 1 B. & P. 558; 2 B. & P. 247; *Doe d. Sams v. Garlick*, 14 M. & W. 698; *Vick v. Sueter*, 3 E. & B. 219; *Burton v. Power*, 3 K. & J. 170.

And where there is a devise subject to a charge on the devisee without words of limitation, and another devise in exactly the same words not subject to a charge, the latter will not carry the fee. *Right d. Compton v. Compton*, 9 East, 267; *Morris v. Lloyd*, 33 L. J. Ex. 202.

An express estate for life will of course not be enlarged by a charge. *Willis v. Lucas*, 1 P. Wms. 472; *Doe d. Burdette v. Wrighte*, 2 B. & A. 710.

Nor will an indefinite devise, if it appears from the will that only a life estate was meant to be given. *Bolton v. Bolton*, L. R. 5 Ex. 145.

Gift over  
inconsis-  
tent with a  
life estate.

4. A fee passes, if the land is given over in a manner inconsistent with a life estate.

a. Thus a fee is implied from a devise over upon death of the devisee under twenty-one, or at any other specified

time. *Doe v. Cundall*, 9 East, 400; *Frogmorton v. Holiday*, 3 Burr. 1618; 1 W. Bl. 535; *Re English*, 2 Ir. Com. L. 284; *Burke v. Annis*, 11 Ha. 232.

b. A fee is also implied, if the gift over is upon death before a certain age and without issue living at the death. *Toovey v. Bassett*, 10 East, 460; *In re Harrison's Estate*, L. R. 5 Ch. 408. See *Claridge v. Arnold*, W. N. 1880, 141; *Yarrow v. Knightly*, 8 Ch. D. 736.

It makes no difference whether the devise is vested or contingent. *In re Harrison's Estate*, *supra*.

c. It seems doubtful whether, where there is an indefinite devise to children, a mere gift over, if the parent dies without such issue, will give the children the fee. See *Doe d. Cannon v. Rucastle*, 8 C. B. 876.

Effect on a devise to children of a gift over if the parent dies without children.

But if the fee is then expressly given over, it seems the children would also take the fee. *Robinson v. Gray*, 9 East, 1; *Hutchinson v. Stephens*, 1 Kec. 240; see, too, *Re Pollard's Trusts*, 3 D. J. & S. 541.

5. A devise of rents and profits or of the income of lands carried an estate for life in the lands before the Wills Act, and since the Act it carries the fee. *Mannox v. Greener*, 14 Eq. 456.

Devise of rents and profits carries the fee.

The same is the case with a devise of rents and profits for a time that may last for ever. *Bunbury v. Doran*, L. R. 9 C. L. 284.

But a devise of a specific annual sum out of land, though it happens to be the whole amount of the rents and profits, will not carry the land. *Going v. Hanlon*, L. R. 4 C. L. 144.

6. Where property is excepted out of a devise in fee, the exception will carry as large an interest as the devise out of which it is excepted. *Doe d. Knott v. Lawton*, 4 Bing. N. C. 455; 6 Sc. 303; *Hill v. Rattey*, 2 J. & H. 634; *Bennett v. Bennett*, 2 Dr. & Sm. 266.

Exception carries as large an estate as the property out of which it is excepted. The estate of a cestui

7. The estate of a *cestui que trust* is commensurate

*que trust is* with that of his trustee, and therefore, where land is  
*commen-* devised to a trustee and his heirs in trust for a person  
*surate with* without words of limitation, the latter takes the fee.  
*that of the*  
*trustee.*

*Moore v. Cleghorn*, 10 B. 423; 16 L. J. Ch. 469; 17 ib., 400; *Knight v. Selby*, 3 Sc. N. R. 409; 3 M. & Gr. 92; *Challenger v. Shepherd*, 8 T. R. 597; *Smith v. Smith*, 11 C. B. N. S. 121.

So under a devise to trustees in fee upon trust for a life tenant with remainder in trust for a class without words of limitation, the remaindermen take the fee. *Knight v. Selby*, 3 Sc. N. R. 409; 3 M. & Gr. 92; *Maden v. Taylor*, 45 L. J. Ch. 569.

The fact that there are executory gifts over does not prevent the application of the rule, so far as the gifts over do not take effect. *Yarrow v. Knightly*, 8 Ch. D. 736.

The above rule does not apply, where the trustees take for the benefit of ulterior devisees as well. *In re Pollard's Estate*, 3 D. J. & S. 541; see *Sherwin v. Kenny*, 16 Ir. Ch. 138; *Blackhall v. Gibson*, 4 L. R. Ir. 49.

Effect of  
the Wills  
Act in  
passing the  
fee.

B. Now, by the 28th section of the Wills Act a devise without words of limitation passes the fee or other the whole estate or interest, which the testator had power to dispose of by will, unless a contrary intention shall appear by the will.

The fact, that the will contains other devises with words of limitation, will not prevent a devise without such words from passing the fee. *Wisden v. Wisden*, 2 Sm. & G. 396.

Nor will a power given to the devisee to appoint the property generally to her children cut a devise without words of limitation down to a life estate. *Brook v. Brook*, 3 Sm. & G. 280.

Contrary  
intention.

But a devise without words of limitation, followed by a devise of the same property to another person with words of limitation, will give the first devisee a life interest only. *Gravenor v. Watkins*, L. R. 6 C. P. 500.



### III. WORDS OF LIMITATION PROPER TO PASS AN ESTATE TAIL.

Copyholds not being within the Statute *de donis* are entailable only by custom. In the absence of custom a devise of copyholds in words which would create an estate tail in freeholds will give a fee simple conditional on the birth of issue. *Doe d. Blesard v. Simpson*, 3 M. & G. 929; *Hardcastle v. Dennison*, 10 C. B. N. S. 606.

A. The ordinary mode of limiting an estate tail is by the words "heirs of the body" or "issue." What words create an estate tail.

And a devise to A. and his heirs male, or to A. and his heirs lawfully begotten, is an estate tail. *Baker v. Wall*, 1 Ld. Raym. 185; *Tufnell v. Borrell*, 20 Eq. 194; *Nanfan v. Legh*, 7 Taunt. 85; *Good v. Good*, 7 E. & B. 295.

In the case of a deed such words pass a fee. Co. Lit. sec. 31.

Words of limitation superadded to the words heirs of the body will not cut down the estate tail of the ancestor. *Denn d. Gearing v. Shenton*, Cowp. 410. Effect of super-added words of limitation and distribution.

Nor will such words as "the elder son of the ancestor to be preferred to the second or younger son," as they merely indicate the notion the testator incorrectly entertained of the descent of an estate tail. *Fetherston v. Fetherston*, 3 Cl. & F. 67.

And probably a devise to A. and the heirs of his body as tenants in common would give A. an estate tail, notwithstanding *Doe d. Strong v. Goff*, 11 East, 668. See 2 Bl. 55, 58; 3 J. & Lat. 54.

But the heirs, where the word is to be used as a word of limitation, must be the heirs of the ancestor. Therefore a devise to the husband for life, with remainder to the heirs of the body of the husband and wife, will not give an estate tail, because no person can be supposed to To create an estate tail the inheritance must be limited to the heirs of the body

of the an- include in himself the heirs of himself and somebody  
cestor. else. Fearne, C. R. 38; see, too, *Allgood v. Withers*, 2 Burr. 110.

But a devise to the husband and wife, with remainder to the heirs of the body of the husband and wife, gives them a joint estate tail. Fearne, C. R. 38.

**Distinction between heirs of the body of the wife and heirs on the body of the wife begotten.** A devise to husband and wife for life, with remainder to the heirs *on* the body of the wife by the husband to be begotten, vests in both an estate tail; but if the remainder be limited to the heirs of the body *of* the wife by the husband to be begotten, the wife alone has an estate tail, the word heirs in the latter case being considered as applied to the wife only. *Alpass v. Watkins*, 8 T. R. 516; *Denn v. Gillott*, 2 T. R. 431; *Frogmorton d. Robinson v. Wharrey*, 2 W. Bl. 728.

Similarly, a devise to husband and wife for life, remainder to the heirs of the husband on the body of the wife begotten, gives the husband an estate in special tail. *Roe d. Aistrop v. Aistrop*, 2 W. Bl. 1228.

It follows that a devise to the wife for life, remainder to the heirs to be begotten on the body of the wife by the husband, gives the wife no estate tail, because the heirs are not applied to her body. *Gossage v. Taylor*, Sty. 325.

**Effect of limitation to the heirs of the body of several ancestors who may intermarry.** Where there is a joint limitation for life to two persons who may by possibility intermarry (even though they may be respectively married already), with remainder to the heirs of their bodies, they take an estate tail. Co. Lit. 25 b. sec. 25.

So, too, a devise to a man and the heirs of his body by a second wife gives him an estate tail executed in possession, though the devisee had a wife at the time. Fearne, 35. Vent. 228.

**Tenant in tail after possibility** And a devise to the wife for life, with remainder to the heirs of her body by the testator, where the testator has

no issue by his wife, nevertheless makes the wife tenant of issue extinct. *Platt v. Powles*, 2 Mau. & S. 65.

A devise to a man or the heirs of his body is an estate tail. *Parkin v. Knight*, 15 Sim. 83; *Wright v. Wright*, 1 Ves. sen. 409; *Harris v. Davis*, 1 Coll. 416; *Greenway v. Greenway*, 2 D. F. & J. 128. Devise to a man or the heirs of his body.

And a similar construction has sometimes been placed upon a devise to A. or his heirs, both before and since the Wills Act. See *Read v. Snell*, 2 Atk. 642, p. 645; *Lachlan v. Reynolds*, 9 Ha. 797; *Adshead v. Willetts*, 29 B. 358. Construction of a devise to a man or his heirs.

Such a devise would, however, probably now be held to be substitutional in wills since the Wills Act, as it is no longer necessary to change "or" into "and," in order to give the devisee the fee. *Wingfield v. Wingfield*, 9 Ch. D. 658. See *Parsons v. Parsons*, 8 Eq. 260.

B. In some cases the word heir has been held equivalent to heir of the body, where there has been a direction, that the land shall descend to the heirs; as, for instance, where there was a devise to A. for life, and then to descend to his female heir, whether sister or daughter. *Lewthwaite v. Thompson*, 36 L. T. N. S. 910; *Fay v. Fay*, 5 L. R. Ir. 274.

C. With regard to realty, "the word issue in a will *prima facie* means the same thing as heirs of the body, and is to be construed as a word of limitation." Per Parke, B., in *Slater v. Dangerfield*, 15 M. & W. 263. Construction of devise to a man and his issue.

Thus a devise to A. and his issue, or to several and their issue, as tenants in common, would, it seems, give estates tail. *Martin v. Swannell*, 2 B. 249; *Beaver v. Nowell*, 25 B. 551; *Campbell v. Bouskell*, 27 B. 325.

A devise to A. and his issue living at his death has been held to give an estate tail. *University of Oxford v. Clifton*, 1 Ed. 473.

A devise to A. and his issue, and the heirs of such issue, with a gift over in default of issue, before the Wills Act, has the same effect. *Franklin v. Lay*, 6 Mod. 258; 2 Bl. 59 n.

Effect of words of distribution applied to the issue only.

But a devise to A. and his issue as tenants in common, if more than one, the tenancy in common being applied to the issue only, or to A. and his issue to be divided among them as A. should appoint, where there are words to carry the fee, gives A. an estate for life, with remainder to his issue in fee. *Doe d. Gilman v. Elvey*, 4 East, 313; *Hockley v. Mawbey*, 1 Ves. jun. 142. In *Doe d. Davy v. Burnsall*, 6 T. R. 30; 1 B. & P. 215, the word issue was explained to mean children by the gift over, if such issue died without issue.

The rule in *Wild's Case* applies to a limitation to a man and his issue in fee as tenants in common.

And a devise to several and their issue and their heirs as tenants in common gives an estate tail, according to the rule in *Wild's Case* (*post*), if there are no issue at the date of the devise. *Underhill v. Roden*, 2 Ch. D. 494; Co. Lit. 9 a. See *Cancellor v. Cancellor*, 11 W. R. 16.

#### IV. WORDS OCCASIONALLY USED AS WORDS OF LIMITATION.

Words son and child used as words of limitation.

A. The words son and child may be used as words of limitation, if the testator has clearly shown his intention so to use them. "If the word son be not used as a *designatio personarum*, but with a view to the whole class, or as comprising the whole of the male descendants severally and successively, then it is the manifest intention of the testator to give an estate tail." *Mellish v. Mellish*, 2 B. & C. 520.

Thus, if the devise is to A., and if he dies not having a son over, A. takes an estate tail in a case before the Wills Act. *Bifield's Case*, cited 1 Vent. 231; S. C. *sub nom.*; *Milliner v. Robinson*, 1 Moore, 682, pl. 939.

The same is the case if the devise be to A. for life, and then to his son if he has one, and in default of such issue over. *Robinson v. Robinson*, 1 Burr. 38; 2 Ves. sen. 225; 3 Atk. 736; *Mellish v. Mellish*, 2 B. & Cr. 520; *Doe d. Garrod v. Garrod*, 2 B. & Ad. 87; *Murphy v. Johnston*, 6 Ir. Ch. 230; *Bell v. Bell*, 15 Ir. Ch. 517; *Andrew v. Andrew*, 1 Ch. D. 410.

But a devise to A. for life, and then to such son as she may leave, and his heirs and assigns, goes to all the sons of A. as joint tenants. *Beauchant v. Usticke*, W. N. 1880, 14.

B. The term "eldest son" is less susceptible of a collective meaning than son or child. But it will receive this meaning if the intention is clear. *Doe d. Burrin v. Chorlton*, 1 Scott N. R. 290; 1 M. & Gr. 429; *Lewis v. Puzley*, 16 M. & W. 733; *Cleary's Trust*, 16 Ir. Ch. 438.

And if the devise is to A. for life, then to his eldest son for life, and so on to the eldest son of the family, an estate tail in remainder will be given to A., and not to his eldest son, so as to take in the largest number of descendants. *Forsbrooke v. Forsbrooke*, L. R. 3 Ch. 93.

As between an estate tail in the father or son the Court prefers the former.

C. In the same way the word children may be a word of limitation.

1. Thus a devise to A. to hold to him and his children for ever, or to A. and his children for ever, or to A. and his children lawfully begotten for ever, gives A. an estate tail. *Davie v. Stevens*, Dougl. 321; *Broadhurst v. Morris*, 2 B. & Ad. 1; *Wood v. Baron*, 1 East, 259; *Roper v. Roper*, L. R. 3 C. P. 32; 36 L. J. C. P. 27, 37 ib. 7. See, too, *Doe d. Gigg v. Bradley*, 16 East, 399.

Children used as a word of limitation.

In such cases children would seem to be a word of limitation quite independently of the so-called rule in *Wild's Case*, 6 Rep. 17.

So a devise of all the testator's property to A. and his children in succession gives A. an estate tail. *Earl of*

Devise to A. and his

children in succession. *Tyrone v. Marquis of Waterford*, 1 D. F. & J. 613; see *Snowball v. Proctor*, 2 Y. & C. C. 478.

Rule in *Wild's Case*. 2. A simple devise to A. and his children, where A. has no children at the time of the devise, gives him an estate tail. *Wild's Case*, 6 Co. Rep. 17; *Clifford v. Koe*, 5 App. C. 447.

And for this purpose a child *en ventre* at the date of the will is considered as non-existent. *Roper v. Roper*, L. R. 3 C. P. 32.

Power to appoint the property to children is not inconsistent with an estate tail. The rule applies, though the testator may expressly give the parent a power of appointing the property in question among his children. *Seale v. Barter*, 2 B. & P. 485; *Clifford v. Brooke*, I. R. 10 C. L. 179; 2 L. R. Ir. 184; S. C. nom. *Clifford v. Koe*, 5 App. C. 447. See *In re Moyle's Estate*, 1 L. R. Ir. 155.

Exceptions. 3. There may, however, be an intention shown that the parent was not to take an estate tail.

Thus, in *Buffar v. Bradford*, 2 Atk. 220, the testator showed that he contemplated the mother and children as taking joint interests at a period subsequent to his death. And in *Grieve v. Grieve*, 4 Eq. 180, where there was a devise of a house to the testator's nieces and their children, and if they have not any over, a direction that the furniture was to go with the house was held sufficient to show that an estate tail could not have been intended.

If there are children living at the date of the devise children is *primd facie* not a word of limitation. 4. If there are any children living at the time of the devise, the term children is *primd facie* not a word of limitation. *Byng v. Byng*, 10 H. L. 171; *Oates v. Jackson*, 2 Str. 1172; *Jeffery v. Honywood*, 4 Mad. 398.

But this rule bends to evidence of a contrary intention; thus, a direction that certain things are to go as heirlooms with the estate, is sufficient to rebut a joint tenancy, and to show that an estate tail was intended to be given. *Byng v. Byng*, 10 H. L. 171.

By analogy to the rule in *Wild's Case* a devise to A.

and his sons in tail male, and for want of such issue male over; where A. has no sons gives him an estate tail. *Whar-ton v. Gresham*, 2 W. Bl. 1083; see *Sparling v. Parker*, 29 B. 450.

The rule in *Wild's Case* does not apply to personalty. *Audsley v. Horn*, 26 B. 195, 1 D. F. & J. 226.

The rule in *Wild's Case* does not apply to personalty.

## V. THE RULE IN SHELLEY'S CASE.

The construction of devises to heirs and heirs of the body, after a prior estate of freehold in the ancestor, is governed by the so-called rule in *Shelley's Case*.

It may be laid down generally, that where the ancestor by any will takes an estate of freehold, whether by implication or direct limitation, and whether it may or may not determine in his lifetime, and in the same will an estate is limited by way of remainder, either mediately or immediately, to his heirs in fee or in tail, that always in such case the heirs are words of limitation of the estate and not words of purchase, and therefore the ancestor takes an estate in fee or in tail as the case may be. *Shelley's Case*, 1 Co. 93 b.; *Fearne*, C. R. 33, 40; *Pybus v. Mitford*, 1 Ventr. 372; *Curtis v. Price*, 12 Ves. 99.

The rule in *Shelley's Case* stated.

The two limitations must be in the same instrument, but the Court considers a will and codicils for this purpose as one instrument. *Hayes d. Foorde v. Foorde*, 2 W. Bl. 698.

The rule applies equally to limitations of freehold and copyhold estates, and to estates *pur autre vie*. *Doe d. Jeff v. Robinson*, 8 B. & Cr. 296; 2 Ma. & R. 249; see 2 D. & War. 327; *Crozier v. Crozier*, 3 D. & War. 373.

It applies to limitations, which are both legal or both equitable, even where the first is for the separate use of a married woman. *Spence v. Spence*, 12 C. B. N. S. 199; *Fearne*, C. R. 56; *Pitt v. Jackson*, 2 B. C. C. 51.

It does not apply to cases, where one limitation is legal and the other equitable. *Right v. Creber*, 5 B. & C. 866; *Collier v. McBean*, 34 L. J. Ch. 555.

The rule does not apply so as to destroy intermediate contingent limitations by merger, even in cases before 8 & 9 Vict. c. 106. *Lewis Bowles' Case*, 11 Rep. 80; *Fearne*, C. R. 36.

Nor does it apply where the estate to the heir is limited, not by way of remainder simply, but as a conditional limitation or as an alternative contingent remainder. *Lloyd v. Carew*, Prec. Ch. 72; *Show* P. C. 137; see *Fearne*, 275; *Plunket v. Holmes*, 1 Lev. 11; *Raym.* 28; *Fearne*, 341; *Crofts v. Middleton*, 2 K. & J. 194; 8 D. M. & G. 192; see *In re White & Hindle's Contract*, 7 Ch. D. 201.

Applica-  
tion of the  
rule where  
the limita-  
tion is to  
the heirs  
or the  
heirs of  
the body  
of the  
ancestor.

The rules of construction with reference to cases coming within the operation of the rule in *Shelley's Case* are settled by the leading cases of *Jesson v. Wright*, 2 Bl. 1, and *Roddy v. Fitzgerald*, 6 H. L. 823.

A. Where the words heirs or heirs of the body are used in the limitation of the inheritance the rule applies—

1. Although the limitation of the freehold to the ancestor may be followed by words clearly indicating an intention that his estate is to be for life only.

Restric-  
tions upon  
the estate  
of the an-  
cestor are  
immate-  
rial.

Thus, it is immaterial, that the estate of the ancestor may be declared to be "for life and no longer:" *Roe d. Thong v. Bedford*, 4 Mau. & S. 362, 1 B. C. C. 313; *Robinson v. Robinson*, 1 Burr. 38, 3 B. P. C. 180, 2 Ves. sen. 225; that he is made unimpeachable for waste; *Jones v. Morgan*, 1 B. C. C. 206; *Bennett v. Earl of Tankerville*, 19 Ves. 170; that powers are expressly given him which would be implied if he were tenant in tail, such as powers to jointure and make leases: *Baile v. Coleman*, 2 Vern. 668; *Jones v. Morgan*, 1 B. C. C. 206; *Broughton v. Langley*, 2 Ld. Raym. 873; that his estate is made subject to the obligation of keeping the buildings in repair: *Jesson*



v. *Wright*, 2 Bligh, 1; that there is a restraint upon alienation for longer than his life: *Perrin v. Blake*, 1 W. Bl. 672; *Hayes d. Foorde v. Foorde*, 2 W. Bl. 698; that, where there is no executory trust, there is a declaration that special care should be taken that it should never be in the power of the ancestor to dock the entail: *Leonard v. Earl of Sussex*, 2 Vern. 526; and that there is a limitation to trustees to preserve contingent remainders. *Wright v. Pearson*, Amb. 358; 1 Ed. 119.

2. The rule applies, where words of limitation are superadded to the limitation to the heirs or heirs of the body, provided such words are not inconsistent with the nature of the descent pointed out by the first words, for such words may be looked upon as an explanation of what the testator supposed to be the course of the descent under an estate tail, and *expressio eorum quæ tacite insunt nihil operatur*.

Words of limitation super-added to the word heirs will not make it a word of purchase.

Thus words limiting the estate of the heirs to a life estate, or to a life estate without power to sell or dispose, will be rejected. *Doe d. Elton v. Stenlake*, 12 East, 515; *Hugo v. Williams*, 14 Eq. 224; *Hayes v. Foorde*, 2 W. Bl. 698.

The same will be the case with words of limitation in fee or in tail, superadded to the word heirs or heirs of the body.

Thus a limitation to the heirs of the body of the ancestor and their heirs, or their heirs, executors, administrators, and assigns for ever (a); or to the heirs male of the body of the ancestor, and their issue (b); or to the heirs male of his body in tail, in strict settlement (c); or to the heirs male of his body, and the heirs male of the body of every such heir male severally and successively as they should be in priority of birth, every elder, and the heirs male of his body, to be preferred to every younger (d); will not avail to give the heirs an estate by purchase. *Morris d. Andrews v. Le Gay*, cited 2 Burr. 1103, and 8 T. R. 518; *Kinch v. Ward*, 2

S. & St. 409; *Measure v. Gee*, 5 B. & Ald. 910; *Nash v. Coates*, 3 B. & Ad. 839 (a); *Minshull v. Minshull*, 1 Atk. 411 (b); *Douglas v. Congreve*, 1 B. 59 (c); *Legatt v. Sewell*, 1 Eq. Abr. 395, p. 7; 1 P. Wms. 37; see *Fearne*, 159, 160; see *Fetherston v. Fetherston*, 3 Cl. & F. 67; 9 Bl. 237 (d).

Words of  
distribu-  
tion super-  
added.

3. Words of distribution following the limitation of the inheritance will not prevent the application of the rule, "for it does not follow that the testator did not intend that heirs of the body should take because they could not take in the mode prescribed."

Thus a declaration that the heirs are to take as tenants in common, and not as joint tenants (a); or equally among them, share and share alike (b); or in such shares and proportions as the ancestor should appoint (c); or "as well male as female," or "whether sons or daughters" as tenants in common (d), will not prevent the operation of the rule. *Doe d. Candler v. Smith*, 7 T. R. 531; *Bennett v. Earl of Tankerville*, 19 Ves. 170 (a); *Doe d. Atkinson v. Featherstone*, 1 B. & Ad. 944 (b); *Jesson v. Wright*, 2 Bl. 1; see *Roddy v. Fitzgerald*, 6 H. L. 823; *Dunk v. Fenner*, 2 R. & M. 557 (c); *Doe d. Bosnall v. Harvey*, 4 B. & C. 610; *Pierson v. Vickers*, 5 East, 548 (d).

Gavel-  
kind lands.

In such a case it makes no difference that the lands are gavelkind. *Doe d. Bosnall v. Harvey*, *supra*, overruling *Doe v. Laming*, 2 Burr. 1100.

The absence of a gift over in default of issue is immaterial. *Doe d. Atkinson v. Featherstone*, 1 B. & Ad. 944.

Words of  
distribu-  
tion and  
limitation  
super-  
added.

4. Nor will words of distribution and limitation together, superadded to the limitation of the inheritance, prevent the operation of the rule.

It has sometimes been laid down that words of distribution and limitation together, superadded to the heirs, would make the latter a word of purchase, but the rule is now clearly settled, overruling *Gretton v. Haward*, 6 Taunt. 94; 2 Marsh. 9, and *Crump d. Woolley v. Norwood*, 7 Taunt.

362; 2 Marsh. 161; see *Anderson v. Anderson*, 30 Beav. 209; *Mills v. Seward*, 1 J. & H. 733; *Grimson v. Downing*, 4 Dr. 125; and see *Jordon v. Adams*, 9 C. B. N. S. 483.

Lord Chief Justice Cockburn, in the last cited case, p. 497, thus sums up the law with reference to the extent of the application of the rule in *Shelley's Case*, where the words heirs or heirs of the body are used: "No incident, superadded to the estate for life, however clearly showing that an estate for life merely, and not an estate of inheritance, was intended to be given to the first donee, nor any modification of the estate given to the heirs, however plainly inconsistent with an estate of inheritance, nor any declaration, however express or emphatic, of the deviser, can be allowed, either by inference or by force of express direction, to qualify or abridge the estate in fee or in tail, as the case may be, into which, upon a gift to a man for life, with remainder to his heirs or the heirs of his body, the law inexorably converts the entire devise in favour of the ancestor."

The words heirs or heirs of the body will, however, be construed as words of purchase:

1. When words of limitation are superadded to them inconsistent with the nature of the descent pointed out by the first words, as where the limitation is to a man for life, and after his decease to the use of his heirs and the heirs female of their bodies. *Fearne*, C. R. 182; *Shelley's Case*, 1 Rep. fol. 88, 95 b.

Words of limitation super-added inconsistent with the course of descent of an estate tail in the ancestor.

There appears to be no other authority for this rule than the argument of counsel in *Shelley's Case*, cited with approbation by *Fearne*, C. R., p. 182. It has, however, been followed in a case where the word issue and not heir was used. See *Hamilton v. West*, 10 Ir. Eq. 75. In that case the devise was to Margaret for life, remainder to her issue female and the heirs of their bodies; and it was held that

Margaret took only a life estate, with remainder to her daughters in tail general, and there seems no reason for supposing, that the same principle would not be applied, where the word heirs instead of issue is used. See *Dodds v. Dodds*, 10 Ir. Ch. 476; 11 *ib.* 374.

What is an  
inconsis-  
tent course  
of descent.

In the absence of authority it is doubtful, what amount of discrepancy between the two courses of descent, will justify the application of this rule. Fearn, C. R., p. 183, points out that "there does not appear to be the same inconsistency in construing the first words, which describe heirs special, to be words of limitation, where the super-added words extend to heirs general, as there is where the first words, and those engrafted on them, distinguish two different incompatible courses of descent, and would not carry the estate to the same person; in the latter case it is absolutely impossible, by any implied qualification, to reconcile the superadded words to those preceding them, so as to satisfy both by construing the first as words of limitation; whereas, in the former case, the superadded words are not contrary to or incompatible with the preceding, but in their general sense include them; and there is no improbability in the supposition that they were used by the testator in the same qualified sense as the preceding; and then both may be satisfied, by taking the first as words of limitation." In *Hamilton v. West*, however, the question was between an estate in tail female in the ancestor and an estate in tail general to the daughters, the latter of which would, "in their general sense," have included the former; and it seems, therefore, that Fearn's remark must be taken with some modification.

The testa-  
tor may  
interpret  
the sense  
in which  
he has  
used the  
word heirs.

2. Where the testator has, either by express words, or by implication, interpreted the meaning he intended to convey by the term heirs or heirs of the body, those words may be words of purchase.

In *Fetherston v. Fetherston*, 3 Cl. & F. 67, Lord Brougham lays down, "If there is a gift to A. and the heirs of his body, and then in continuation, the testator, referring to what he had said, plainly tells us that he used the word heirs of the body to denote A.'s first or other sons, then clearly the first taker would only take a life estate."

However, the mere insertion of such words as, if more than one child, or, if only one child, then to such child, is not sufficient to show that the testator meant by heirs of the body, children. *Roddy v. Fitzgerald*, 6 H. L. 823; *Jesson v. Wright*, 2 Bl. 1.

And even if the words are, if there be but one *such* child, to such child, his or her heirs for ever, the term heirs of the body will not be held to mean children, if there are no words to carry the fee to them, except in the event of there being only one child. *Bridge v. Chapman*, Notes of Cases, L. J., July 10, 1875, 118; see *Ryan v. Cowley*, Ll. & G. temp. Sug. 7.

But in similar cases heirs of the body will be construed as children, if there are words giving them an estate in fee or in tail. *Goodtitle d. Sweet v. Herring*, 1 East, 264; *Gummoe v. Howes*, 23 B. 184. In *Poole v. Poole*, 3 B. & P. 620, this construction was rebutted by other limitations.

So, if the testator, after using the words heirs of the body, continues, "that is to say, the first, second, and other sons, etc." *Lowe v. Davies*, 2 Ld. Raym. 1561.

Or again, the testator may explain his meaning by reference to other limitations. *Meredith v. Meredith*, 10 East, 503; *Doe d. Woodall v. Woodall*, 3 C. B. 349; *East v. Twyford*, 4 H. L. 517.

And the word heirs of the body, coupled with a reference to the ancestor, as their father, must mean children. *Jordan v. Adams*, 9 C. B. N. S. 483.

First heirs  
male.

B. The application of the rule in *Shelley's Case* is the same, where the words are first heirs male or heirs of the body who shall attain twenty-one. *Minshull v. Minshull*, 1 Atk. 4 11; *Toller v. Attwood*, 15 Q. B. 929.

Limitation  
to the heir  
of the  
tenant for  
life.

C. When the word heir is used in the singular, the rules of law are less stringent in uniting the limitation of the inheritance to the estate for life of the ancestor.

1. However, the word heir, in the singular, without words of limitation superadded, is a word of limitation and not of purchase, even when such words as "next" or "first" are added to it. *Blackburn v. Stables*, 2 V. & B. 367; *Burley's case*, cit. 1 Vent. 230; *Whiting v. Wilkins*, 1 Bulst. 219; *Richards v. Lady Bergavenny*, 2 Vern. 324; *White v. Collins*, Com. Rep. 289; *Dubber d. Trollope v. Trollope*, Ambl. 453.

The fact that the limitation is to the heir for ever makes no difference. *Fuller v. Chamier*, L. R. 2 Eq. 682.

Words of  
limitation  
super-  
added to  
the word  
heir.

2. But words of limitation in fee or in tail, superadded to the word heir, make it a word of purchase. *Archer's case*, 1 Co. 66; *Fearne*, C. R. 150; *Clerke v. Day*, Moore, 593; *Willis v. Hiscox*, 4 M. & Cr. 197; *Greaves v. Simpson*, 12 W. R. 773; 10 Jur. N. S. 609.

And even a devise to A. to hold to him and the heir male of his body, and the heirs and assigns of such heir male for ever, followed by a gift over, if A. died without leaving any son of his body, has been held to give A. a life estate only. *Chamberlayne v. Chamberlayne*, 6 E. & B. 625.

3. Where the estate of the heir is expressed to be for life, inasmuch as he is not to have the inheritance, he cannot take as heir by descent. *White v. Collins*, Com. 289.

The rule  
in *Shel-  
ley's Case*  
applies  
where the

D. The application of the rule in *Shelley's Case*, where the limitation is to the issue of the ancestor, who takes a prior estate of freehold :

"The authorities clearly show that, whatever be the *prima facie* meaning of the word issue, it will yield to the intention of the testator to be collected from the will, and that it requires a less demonstrative context to show such intention than the technical expression heirs of the body would do." *Per* Alderson, B., *Lees v. Mosley*, 1 Y. & C. Ex. 609.

limitation is to the issue of a tenant for life. Distinction between the word issue and heirs.

This doctrine was questioned by Lord Wensleydale in *Roddy v. Fitzgerald*, 6 H. L. 882:—"I certainly feel a difficulty in figuring to myself, what precise sort of context would be sufficient to alter the sense of the word issue, which would not have the same effect, if the words used were the admitted technical words, heirs of the body." There can, however, be no doubt that words of modification will more readily convert the word issue than the word heirs into a word of purchase, and the remark of Lord Wensleydale must be held to apply to cases where other words have interpreted the word issue to mean children. Thus:

1. Words of distribution alone, superadded to the word issue, in cases where the issue would not take the inheritance, will not make it a word of purchase. *Doe d. Blandford v. Applin*, 4 T. R. 82; *Doe d. Cock v. Cooper*, 1 East, 229; *Roddy v. Fitzgerald*, 6 H. L. 823; *Colclough v. Colclough*, 1 R. 4 Eq. 263; *Woodhouse v. Herrick*, 1 K. & J. 352; *Blackhall v. Gibson*, 2 L. R. Ir. 49.

Words of distribution alone super-added in cases before the Wills Act.

This is clear, when there is a gift over upon an indefinite failure of issue; but it seems, that a gift over is immaterial, since, under the old law, the issue, if they took as purchasers, could only take for life, and therefore the testator's general intent to benefit all the issue would fail. See *per* Wood, V.-C., in *Kavanagh v. Morland*, Kay, 16, 27, where the same construction prevailed, although the gift over was in default of issue

of the tenant for life living at his death ; and this is in accordance with *Doe v. Rucastle*, 8 C. B. 876.

Words of  
limitation  
super-  
added.

2. Words of limitation in fee or in tail, superadded to the word issue, where there is a limitation in default of issue in cases before the Wills Act, will not make it a word of purchase, provided they do not change the course of descent. *Roe d. Dodson v. Grew*, 2 Wils. 324 ; *Wilm. 272* ; *Denn d. Webb v. Puckey*, 5 T. R. 299 ; *Frank v. Stovin*, 3 East, 548 ; *Griffiths v. Evan*, 5 B. 241.

The same rule applies where the gift over is on failure of issue living at the death of the person, to whom the prior estate is limited, or on death of the issue under twenty-one. *Warren v. Travers*, 1 R. 2 Eq. 455 ; see *Fetherston v. Fetherston*, 3 Cl. & F. 67 ; 9 Bl. 237. *Merest v. James*, 1 B. & B. 484 ; 4 J. B. Moo. 327, must be considered overruled.

Effect of  
the ab-  
sence of  
a gift over  
in default  
of issue.

Whether the absence of a gift over in default of issue will convert issue into a word of purchase seems doubtful. In *Doe d. Cooper v. Collis*, 4 T. R. 294, a devise to S. for life, and after her decease to the issue of her body and their heirs for ever, without any limitation in default of issue, was held to give S. an estate for life only ; but the judgment was not based upon the absence of a limitation over in default of issue, and the authority of the case seems questionable. On the whole it seems, that when the fee is already in the issue, the gift over can have no influence either way, the dying without issue being held to refer to such issue as were before mentioned. See the remarks of Wood, V.-C., *Kay*, 16, 27 ; and see *Montgomery v. Montgomery*, 3 J. & Lat. 47.

3. If, however, the superadded words of limitation alter the course of descent, the issue will take as purchasers. *Hamilton v. West*, 10 Ir. Eq. 75 ; *Dodds v. Dodds*, 10 Ir. Ch. 476 ; 11 *ib.* 374, *ante*, p. 340.

Words of

4. Words of limitation in fee or in tail, and of distri-



bution, superadded to the word issue, make it a word of limitation and distribution super-added to make issue a word of purchase, whether there is a limitation over in default of issue or not. *Lees v. Mosley*, 1 Y. & C. Ex. 589; *Crozier v. Crozier*, 3 D. & War. 373; *Greenwood v. Rothwell*, 5 M. & Gr. 628; 6 Sc. N. R. 670; *Montgomery v. Montgomery*, 3 J. & Lat. 47; *Slater v. Dangerfield*, 15 M. & W. 263; *Colclough v. Colclough*, 1 R. 4 Eq. 263; *M'Kenna v. Eager*, 1 R. 9 C. L. 79.

It makes no difference, whether a fee be given to the issue by express words or by implication from a power of appointing to them. *Bradley v. Cartwright*, L. R. 2 C. P. 511.

But a power of appointing to issue, which would authorise an appointment in fee, will not make the word issue a word of purchase, where there is an express gift to issue as tenants in common without words giving them the fee. *Blackhall v. Gibson*, 2 L. R. Ir. 49.

5. It may be noticed that, in wills coming under the operation of the Wills Act, a devise to A. for life, and after his death to his issue as tenants in common, will fall under the last head, since under such words the issue would take a fee.

Words of distribution super-added in cases since the Wills Act.

6. In *King v. Burchell*, Amb. 879; 4 T. R. 296 n, a direction against alienation by the tenant for life and his issue, or any of them, was held to show that the word issue was used as a word of limitation. See, too, *Tate v. Clark*, 1 B. 100.

Effect of a restraint upon alienation by the tenant for life and his issue or any of them.

## CHAPTER XXIX.

## ESTATES OF TRUSTEES.

## I. IN WHAT CASES TRUSTEES TAKE THE LEGAL ESTATE.

Appoint-  
ment of  
trustees of  
inherit-  
ance. THE appointment of certain persons as trustees of inheritance gives them the fee. *Trent v. Hanning*, 1 B. & P. N. R. 116 ; 7 East, 97 ; 10 Ves. 495 ; 1 Dow. 102.

So the appointment of a person as executor, "so far as is necessary to the performance of the trusts relating to my real estate," gives the executor the fee. *Plenty v. West*, 6 C. B. 201 ; 16 B. 175 ; *Sidebotham v. Watson*, 11 Ha. 170.

But if the land is expressly devised to beneficiaries, the appointment of persons as trustees for carrying the disposition of the testator's property into proper effect will not give the trustees the fee. *L. & S. W. R. Co. v. Bridger*, 12 W. R. 948.

Appoint-  
ment of  
new  
trustees by  
codicil. Where land is devised to three trustees, and the appointment of one of the trustees is revoked, and another is appointed in his place, the fee passes to the new trustee jointly with the two remaining trustees. *Re Hough's Will*, 4 De G. & S. 371 ; *Re Turner*, 30 L. J. Ch. 144 ; 9 W. R. 174 ; 2 D. F. & J. 527.

A direction to executors to let the testator's lands, and out of the profits to pay two sums, followed by a gift of the rents of the land, gives the executors no estate beyond the period for accomplishing the purpose indicated. *Lam-*

\* Also a devise to A & B upon trust to pay the rents to C or permit him to receive the same would give the legal estate to C - A devise to A & B upon trust to pay the rents to A (or B) or permit him to receive the same would leave the legal estate in A & B and give the tenant for life only an equitable 347 life estate  
LEGAL ESTATE. *Tauquary, Williams -*

*bert v. Browne*, 1 R. 5 C. L. 218. See *Smith v. Smith*, 1 L. R. Ir. 206.

A direction to executors to pay annuities out of the testator's whole estate, which is disposed of after payment of the annuities, gives the executors the fee. *Doe v. Woodhouse*, 4 T. R. 89. Direction to pay annuities out of realty.

A devise unto and to the use of A., in trust for B., gives A. the legal estate by analogy to the Statute of Uses; while, similarly, a devise to A., in trust for B., gives B. the legal estate. See *Cunliffe v. Brancker*, 3 Ch. D. 393. Effect of the Statute of Uses on devises to trustees.

In the latter case it makes no difference that the devise to the trustees is subject to payment of debts, if the duty of paying them is not imposed on the trustees. *Kenrick v. Lord Beaucherk*, 3 B. & P. 178; *Jones v. Lord Say*, 8 Vin. 262, pl. 19.

But the legal estate will remain in the trustees, if it is necessary for the performance of the trust imposed upon them.

Thus, a devise to trustees and their heirs in trust to pay the rents to B. gives the trustees the legal estate. *Doe v. Homfray*, 6 A. & E. 206. Devise in trust to pay rents.

But a devise to trustees to permit B. to receive the rents vests the legal estate in B. *Right d. Phillips v. Smith*, 12 East, 455; *Doe d. Noble v. Bolton*, 11 Ad. & E. 188. Devise to permit *cestui que* trust to receive rents.

And, similarly, if the trust is to pay to or permit B. to receive the rents, the latter direction takes effect and the legal estate vests in B. *Doe v. Biggs*, 2 Taunt. 109; *Baker v. White*, 20 Eq. 166. \*

But if the beneficiaries are to receive only the net profits, the trustees take the legal estate. *Barker v. Greenwood*, 4 M. & W. 421. Net rents.

If the trust is to permit a married woman to receive the rents to her separate use, the legal estate remains in the trustees. *Harton v. Harton*, 7 T. R. 652. But this Separate use.

principle does not apply to a deed. *Williams v. Waters*, 14 M. & W. 166.

Trustees to preserve contingent remainders.

If the trustees are to preserve contingent remainders during the life of the tenant for life, a trust to permit the latter to receive the rents will not give him the legal estate. *Biscoe v. Perkins*, 1 V. & B. 485.

Effect of a power to give receipts on the legal estate.

And it would seem, that a power to the trustees to give receipts would show that they were to receive the rents and pay them over to the beneficiaries, notwithstanding the trust is to permit the beneficiaries to receive them. But a receipt clause will not have this effect if copyholds are given with the freeholds, since it may be limited to the former, to which the Statute of Uses does not apply. *Baker v. White*, 20 Eq. 166.

If the receipts of the beneficiary are to be with the approbation of the trustees, they take the legal estate. *Gregory v. Henderson*, 4 Taunt. 772.

The fact that no sufficient estate is limited to support contingent remainders will not prevent the uses from being legal. *Cunliffe v. Brancker*, 3 Ch. D. 393.

If there is a devise in remainder to children who shall attain twenty-one, a power of maintenance given to the trustees will prevent the use in remainder from becoming legal. *In re Berry's Estate; Berry v. Berry*, 47 L. J. Ch. 182; 26 W. R. 327.

Trust to pay debts and legacies.

A devise to trustees upon trust to pay debts and legacies vests the legal estate in them at once, whether the personalty is sufficient for that purpose or not. *Murthwaite v. Jenkinson*, 2 B. & C. 357; 3 D. & Ry. 765.

Trust to arise only if the personalty is insufficient.

On the other hand, if the trust is to pay the debts out of the realty only if the personalty proves deficient, the trustees take the legal estate, only if the event happens. *Carlyon v. Truscott*, 20 Eq. 339. See *Doe d. Cadogan v. Ewart*, 7 A. & E. 636.

If there is a general direction to pay debts whereby the

debts are charged upon the lands of the testator, followed by a devise of the lands to trustees and their heirs to certain uses, the legal estate remains in the trustees. *Houston v. Hughes*, 6 B. & C. 403; *Baker v. White*, 20 Eq. 166, 173.

The Statute of Uses does not apply to leaseholds for years or to copyholds, and therefore a devise of copyholds to A., in trust for B., gives A. the legal estate. *Houston v. Hughes*, 6 B. & C. 403; *Baker v. White*, *supra*.

Leaseholds for years and copyholds are not within the Statute of Uses.

There is no so-called doctrine of attraction by which, where freeholds and copyholds are given together, the legal estate in the freeholds attracts the legal estate in the copyholds, or *vice versa*. *Baker v. White*, 20 Eq. 166; overruling *Baker v. Parson*, 42 L. J. Ch. 228.

An appointment, under a power to appoint the use, vests the legal estate in the appointee. 2 Jarman, 284.

## II. THE QUANTITY OF THE ESTATE OF TRUSTEES.

As regards the quantity of the estate taken by the trustee, the same rules apply to copyholds, leaseholds, and freeholds. *Doe v. Barthrop*, 5 Taunt. 382; *Baker v. White*, 20 Eq. 166; *Stevenson v. Mayor of Liverpool*, L. R. 10 Q. B. 81; see *Wyman v. Carter*, 12 Eq. 309.

1. A devise to trustees and their heirs, with a general power to sell or convey, will give them the fee though some of the limitations might, in the absence of such a power, be legal. *Rackham v. Siddall*, 1 Mac. & G. 607; *Doe d. Shelley v. Edlin*, 4 A. & E. 582; *Bagshaw v. Spencer*, 1 Ves. sen. 142; 2 Atk. 570; *Watson v. Pearson*, 2 Ex. 581; *Blagrove v. Blagrove*, 4 Ex. 550; *Cropton v. Davies*, L. R. 4 C. P. 159.

Devise in fee with power to sell or convey.

But in the case of copyholds, a direction that they are to be transferred does not require the legal estate. *Doe d. Player v. Nicholls*, 1 B. & C. 336.

Direction to transfer copyholds.

And if the power of sale does not arise till after a life estate, the ordinary rule applies to ascertain whether the life estate is equitable or legal. *Doe d. Noble v. Bolton*, 11 A. & E. 188.

Devise without words of limitation enlarged to a fee by power of sale.

And even, where the devise before the Wills Act would not have carried the fee, a trust to sell will give trustees the fee. *Doe d. Cadogan v. Ewart*, 7 Ad. & E. 636.

2. But though there may be words which will give the trustees a fee, their estate may be controlled if it can be shown what less estate will satisfy the trust.

Devise in fee till an infant attains twenty-one.

Thus, a devise to trustees and their heirs till an infant attains twenty-one, and then to the infant in fee, gives the trustees only a chattel interest. *Goodtitle v. Whitby*, 1 Burr. 228.

Devise in fee to preserve contingent remainders.

So, a devise in fee to trustees to preserve contingent remainders will be cut down to an estate for the life of the tenant for life, if there are no subsequent remainders to preserve. *Doe d. Compere v. Hicks*, 7 T. R. 433; *Haddelsey v. Adams*, 22 B. 266; *Saunders v. Eppe*, 9 W. R. 69.

If, however, there is a power of appointment under which contingent remainders may be created, the estate of the trustees will not be cut down. *Venables v. Morris*, 7 T. R. 342, 437.

This, however, only applies to trustees, especially inserted to preserve contingent remainders. *Doe v. Barthrop*, 5 Taunt. 382.

Devise in fee to pay rents to A. for life with legal remainder over.

So a devise to trustees in fee, on trust to pay rents to A. for life, with remainder to B., gives them an estate for A.'s life only. *Playford v. Hoare*, 3 Y. & J. 175.

*A fortiori*, if the devise in remainder is an independent devise. *Adams v. Adams*, 6 Q. B. 860; *Cooke v. Blake*, 1 Ex. 220.

In a deed as a general rule a limitation to the use of

trustees in fee will not be cut down to a smaller estate. *Cooper v. Kynock*, 7 Ch. 398.

However, it has been held that a limitation in fee to trustees to preserve contingent remainders will, even in a deed, be cut down to an estate *pur autre vie*, if there is a subsequent limitation of a term to the same trustees. *Curtis v. Price*, 12 Ves. 89; *Beaumont v. Marquis of Salisbury*, 19 B. 198.

But a subsequent limitation in fee to the same trustees, and a grant of a term to other persons, will not cut down the estate of the trustees. *Colman v. Tyndall*, 2 Y. & J. 605; *Lewis v. Rees*, 3 K. & J. 132; see *Fowler v. Lightburne*, 11 Ir. Ch. 495.

Where the devise is to trustees in fee, and they must at least take an estate for life, an indefinite power of leasing will show that they were to have the fee. *Doe d. Tomkyns v. Willan*, 2 B. & Ald. 84; *Doe d. Keen v. Walbank*, 2 B. & Ad. 554; *Riley v. Garnett*, 3 De G. & S. 629; *Collier v. Walters*, 17 Eq. 252; see 1 Ch. 81.

Effect of leasing powers where the devise is in fee.

This does not apply where the power to lease is limited to the continuance of the trust. *Doe d. Kimber v. Cafe*, 7 Ex. 675.

As to what is a general power of leasing, see *Vivian v. Jegon*, L. R. 3 H. L. 285.

And if the first life estate is in trust for a married woman for her separate use, as well as some of the remainders, the intermediate estates will not be legal estates; but the legal estate will be in the trustees, at any rate as long as there are any remainders to the separate use of married women left. *Harton v. Harton*, 7 T. R. 652; *Brown v. Whiteway*, 8 Ha. 145; *Toller v. Attwood*, 15 Q. B. 929.

Effect where there are remainders to the separate uses of a married woman.

When there is a devise to trustees in fee, followed by a direction to pay debts, or even, when the trustees are also executors, by a mere general direction to pay debts, the

Devise in fee with a direction to pay debts.

fee will not be cut down to a smaller interest, such as an interest *pur autre vie*. *Spence v. Spence*, 10 W. R. 605; *Creaton v. Creaton*, 3 Sm. & G. 386; *Smith v. Smith*, 11 C. B. N. S. 121.

But this is not the case with a mere charge of debts. *Kenrick v. Lord Beauclerk*, 3 B. & P. 178.

Mere  
general  
direction  
to pay  
debts.

And a general direction to pay debts will not enlarge a devise to trustees without words of limitation to a fee. *Doe v. Claridge*, 6 C. B. 641.

A devise in fee upon trust to pay an annuity for life, and after the death of the annuitant upon trust for A. in fee, gives the legal estate in fee to the trustees, if the trustees would be bound to raise arrears of the annuity by sale or mortgage. *Fenwick v. Potts*, 8 D. M. & G. 506; *Whittemore v. Whittemore*, 38 L. J. Ch. 17.

Devise to  
trustees  
without  
words of  
limitation  
upon trust  
to pay  
debts  
before the  
Wills Act.

4. In cases before the Wills Act a devise to trustees in words, that did not carry the fee, upon trust to pay debts, or make certain specified payments out of the rents, only gave them a chattel interest till the payments were made. *Cordall's Case*, Cro. El. 316; *Doe v. Simpson*, 5 East, 162; *Ackland v. Lutley*, 9 A. & E. 879; *Heardson v. Williamson*, 1 Kee. 33.

So where the trustees were to pay annuities, and then a specified sum out of the rents and profits, they took an estate for the lives of the annuitants with a chattel interest superadded. *Doe d. White v. Simpson*, 5 East, 162.

Sections  
30 & 31 of  
the Wills  
Act.

The law, however, on this point has been altered by the 30th and 31st sections of the Wills Act, which provide:—

Section 30. "That when any real estate (other than or not being a presentation to a church) shall be devised to any trustee or executor, such devise shall be construed to pass the fee simple, or other the whole estate or interest, which the testator had power to dispose of by will, in such



real estate, unless a definite term of years, absolute or determinable, or an estate of freehold, shall thereby be given to him expressly or by implication."

Section 31. "That where any real estate shall be devised to a trustee, without any express limitation of the estate to be taken by such trustee, and the beneficial interest in such real estate, or in the surplus rents and profits thereof, shall not be given to any person for life, or such beneficial interest shall be given to any person for life, but the purposes of the trust may continue beyond the life of such person, such devise shall be construed to vest in such trustee the fee-simple or other the whole legal estate which the testator had power to dispose of by will in such real estate, and not an estate determinable when the purposes of the trust shall be satisfied."

The short effect of these obscure sections as stated by Jarman, and adopted by most of the writers who have followed him, is, "that trustees whose estate is not expressly defined by the will, must in every case, and whatever be the nature of the duty imposed on them, take either an estate for life or an estate in fee." 2 Jarm. 296; see Shelford, Real Property Stat. 532; Lewin on Trusts, 195.

Effect of these sections according to Mr. Jarman.

## CHAPTER XXX.

ON CERTAIN POWERS COMMONLY INSERTED IN  
WILLS.

I. Powers of sale. A POWER of sale and exchange authorises a partition.  
*In re Frith & Osborne*, 3 Ch. D. 618.

Mortgage. A power of sale will not as a general rule authorise a mortgage, though it may, if the object of the sale is to raise a particular charge, subject to which the estate is devised. *Stroughill v. Anstey*, 1 D. M. & G. 635.

Severance of minerals. An ordinary power of sale does not authorise the severance of the timber or minerals from the land. *Cholmeley v. Paxton*, 3 Bing. 207; S. C. nom. *Cockerell v. Cholmeley*, 10 B. & C. 564; 3 Russ. 565; 1 R. & M. 418; 6 Bl. N. S. 120; 1 Cl. & F. 60; *Buckley v. Howell*, 29 B. 546.

The Confirmation of Sales Act, 25 & 26 Vict. c. 108, confirms past sales of lands without the minerals, and enables trustees to make such sales with the consent of the Court.

Whether power of sale extends to purchased lands. Where there was a power to sell trust funds and invest them in the purchase of land, to be held on such trusts as would best correspond with those then subsisting, with a direction that land purchased should be considered personally, it was held that the power of sale extended to purchased lands. *Tait v. Lathbury*, 1 Eq. 174; 35 B. 112.

Power of sale at death of tenant for life. A power of sale to be exercised after the death of a tenant for life cannot be exercised during his life, though he may consent to the sale. *Blacklow v. Laws*, 2 Ha.

40; *Johnstone v. Baber*, 8 B. 233; *Mosley v. Hide*, 17 Q. B. 91; *Waut v. Stallibrass*, L. R. 8 Ex. 175.

A direction to sell within five years has been held to be directory merely where the purchase money was to be applied in payment of debts. *Pearce v. Gardner*, 10 H. 287; see *Cuff v. Hall*, 1 Jur. N. S. 972.

Where land is devised to several trustees in fee upon trust to sell, the survivors can sell; and it is not necessary to fill up the number of trustees in order to make a good title. *Lane v. Debenham*, 11 Ha. 192.

Similarly if one trustee disclaims the others can sell. *Nicloson v. Wadsworth*, 2 Sw. 365; *Adams v. Taunton*, 5 Mad. 435; see *Crewe v. Decken*, 4 Ves. 97.

Under a devise to trustees and their heirs upon trust that they or the trustees or trustee for the time being shall sell, the heir of the surviving trustee can sell. *In re Morton & Hallett*, 15 Ch. D. 143.

There is an important distinction between a power coupled with an interest and a bare power.

Thus a devise to executors to sell passes the interest, but a devise that executors shall sell the land, or that land shall be sold by them, gives them but a power. *Howell v. Barnes*, Cro. Car. 382; *Yates v. Compton*, 2 P. W. 308; *Lancaster v. Thornton*, 2 Burr. 1027; *Doe v. Shotter*, 8 A. & E. 905; see *Knocker v. Bunbury*, 6 Bing. N. C. 306; *Lambert v. Browne*, I. R. 5 C. L. 218.

A direction to the testator's executors to sell his lands gives the executors a common law authority under which they can vest the legal estate in a purchaser without the concurrence of the heir. Co. Lit. 112 b.

If the lands are devised by the will subject to the direction, it would seem the concurrence of the beneficiaries in the sale would be no more necessary, than the concurrence of the heir, if the land is not devised.

The proper form of conveyance in such a case appears

to be a bargain and sale which will not require to be enrolled under 27 Hen. VIII. c. 16, as it takes effect at Common Law and not under the Statute of Uses.

Direction  
to sell  
copyholds.

If the testator directs copyholds to be sold, or to be sold and conveyed, the purchaser is entitled to be admitted without the previous admittance either of the trustees or the heir. *Holder v. Preston*, 2 Wils. 400; *R. v. Wilson*, 11 W. R. 70; 3 B. & S. 201.

The same principle applies if the copyholds are devised to the trustees subject to the power. *Glass v. Richardson*, 9 Ha. 698; 2 D. M. & G. 658.

Acting  
executors  
may sell.

The statute 21 Hen. VIII. c. 4, enacts in effect, that if any of the executors refuse to undertake the administration and charge of the will, the executors or executor accepting the charge may sell under a direction to the executors to sell the land.

Copyholds are within the statute. *Peppercorn v. Wayman*, 5 De G. & S. 230.

Sale by  
adminis-  
trator.

A power of sale given to the testator's executors or administrators may be exercised by his administrator *durante minore ætate*. *Monsell v. Armstrong*, 14 Eq. 423.

Bare  
power does  
not sur-  
vive.

It appears to be settled that a bare power of sale given to several persons *nominatim* cannot be exercised by the survivors. Co. Lit. 113 a, note by Hargrave.

Bare  
power  
connected  
with an  
office.

If the persons are also appointed executors, the question would be whether the power is given to them in respect of their office, or whether a personal confidence is reposed in them. See *In re Cooke's Contract*, 4 Ch. D. 454.

Power to  
named  
executors.

It is, however, settled that under a direction to "executors hereunder named" to sell land, surviving executors can sell. *Howell v. Barnes*, Cro. Car. 382; W. Jo. 352; *Brassey v. Chalmers*, 4 D. M. & G. 528.

Survivors  
of a class  
may sell.

It would seem, that where there is a direction that the land shall in certain events be sold by a class of persons

such as the testator's sons, the power can be exercised by the surviving sons, though some have died after the testator's death. *Vincent v. Lee*, Cro. Eliz. 26.

A power of sale given to executors, the object of the sale not being payment of debts, cannot be executed by an executor of an executor. Yearbooks, 19 Hen. VIII. fo. 9 a, pl. 4; Chance on Powers, 250. Executor of executor cannot sell.

It has been held that a bare power to sell given to trustees and their heirs can be exercised by the surviving trustees and the heir of a deceased trustee jointly, but not by survivors of the trustees only. *Mansell v. Vaughan*, Wilm. 51; *Townsend v. Wilson*, 1 B. & Ald. 608; 3 Mad. 261. See *Hall v. Dewes*, Jac. 189. Bare power to trustees and their heirs.

Where the consent of a tenant for life is required an infant tenant for life may consent if there is an intention shown that the power should be exercisable during minority; for instance, if the power is to be exercised with the consent of a named person who is an infant at the time. *In re Cardross' Settlement*, 7 Ch. D. 728. Whether infant can consent.

If the consent of the tenant for life is required, he may give his consent, though he has aliened his life estate, if his alienee concurs. *Alexander v. Mills*, 6 Ch. 124. Tenant for life may consent after alienation.

In the event of the bankruptcy of the tenant for life, the power of sale may be exercised with the consent of the tenant for life and his trustee in bankruptcy. *Holdsworth v. Goose*, 29 B. 111; *Eisdale v. Hammersly*, 31 B. 255. Bankruptcy of tenant for life.

If the tenant for life upon the alienation of his life estate has expressly reserved his right to consent to the sale, the concurrence of the alienee of the life estate is not necessary. *Warburton v. Farn*, 16 Sim. 625. Reservation of power of consent.

Where trustees were authorised to sell with the consent of the tenant for life for the time being and to invest the proceeds, and there was a direction that no investment should be made while there should be a tenant for life or Power of sale with consent.

tenant in tail of full age without his consent, it was held that the trustees might sell during the minority of a tenant in tail without his consent. *In re Neave's Estates*, 28 W. R. 976 ; 49 L. J. Ch. 642.

Where the power of sale was exercisable with the consent of any tenant for life entitled to the possession of the estates, and the testator created a term upon trust to pay the rents of all his estates to his wife during her widowhood and in the event of her marriage upon trust to pay her an annuity, it was held that the trustees might sell with the consent of the tenant for life and widow. *Robertson v. Walker*, 44 L. J. Ch. 220.

Whether survivors of a class can consent.

Where the power was not to be exercised over any part of the property without the consent of the testator's "sons and daughters also," who were tenants for life, it was considered doubtful whether the power could be exercised after the death of a daughter. *Sykes v. Sheard*, 33 B. 114 ; 2 D. J. & S. 6.

Power of sale over reversion.

It appears to be clear, that where a reversion is settled for life with remainders, and a power of sale is given to trustees, the power of sale may be exercised before the property falls into possession. *Clark v. Seymour*, 7 Sim. 67 ; *Blackwood v. Borrowes*, 4 Dru. & War. 441, 468.

If the reversion is only to be sold with the consent of the person in possession under the will, the property may be sold if the person in possession surrenders his life interest to the person entitled under the will. *Truell v. Tysson*, 21 B. 437 ; see *Giles v. Horner*, 15 Sim. 359.

Sale at a future date.

A trustee for sale cannot contract to sell at a future time at a price now fixed. *Clay v. Rufford*, 5 De G. & S. 768.

Sale of several properties together.

Trustees with a power of sale may join with the owner of another property in selling both properties, if such a mode of sale is beneficial ; but the purchase-money must be apportioned before the completion of the purchase. *Cavendish v. Cavendish*, 10 Ch. 319 ; *Morris v.*

*Debenham*, 2 Ch. D. 540; *In re Cooper & Allen*, 4 Ch. D. 802, where *Rede v. Oakes*, 4 D. J. & S. 505, is explained.

A power of sale is spent as soon as the interests under the instrument have become vested in persons able to dispose of them absolutely. *Lantsbery v. Collier*, 2 K. & J. 718; *Woolley v. Jenkins*, 23 B. 53, affirmed 3 Jur. N. S. 321; *Peters v. Lewes & East Grinstead Ry. Co.*, 50 L. J. Ch. 172.

Where power of sale at an end.

For the purpose of determining, whether the interests have become absolutely vested, limitations created under a special power of appointment are to be considered, as if they had been inserted in the original instrument. *In re Brown's Settlement*, 10 Eq. 349.

Limitations created under special power.

The fact that a jointure secured by a term remains charged, and that the widow has power to charge a sum of money on the estate, will not keep the power of sale alive. *Woolley v. Jenkins*, 23 B. 53; *Wheate v. Hall*, 17 Ves. 86.

Existence of jointure.

If the property is devised in moieties, the fact that the trusts of one moiety have come to an end will not put an end to the power of sale, if the trusts of the other moiety are subsisting, unless the power is limited to property subject to continuing trusts. *Trower v. Knightley*, 6 Mad. 134; *Wood v. White*, 4 M. & Cr. 460.

Vesting of one moiety.

A power of selling for a particular purpose only, such as payment of debts, is, of course, at an end if the purpose is satisfied. *Carlyon v. Truscott*, 20 Eq. 348.

Power to sell for satisfied purpose.

Trustees will not be compelled to sell, if they honestly think that no case for a sale has arisen. *Marquis of Camden v. Murray*, 50 L. J. Ch. 282.

The fact that an action has been commenced to execute the trusts of the will would not prevent the trustees from exercising a power of sale if they are willing to do so, though a prudent trustee would not sell without the sanction of the Court. It may be advisable for the purchaser not to complete without notice to the plaintiffs in the action. *Cafe v. Bent*, 3 Ha. 245, 249; *Turner v. Turner*, 30 B. 414.

Suspension of power of sale.

The case of *Walker v. Smallwood*, Amb. 676, is no authority to the contrary. See, however, Lewin on Trusts, 374.

After judgment the powers of the trustees can only be exercised under the sanction of the Court. *Bethell v. Abraham*, 17 Eq. 24.

Persons to exercise power not named.

A difficulty sometimes arises, where there is a direction to sell the testator's land, but the persons to carry out the sale are not mentioned.

Executors may sell if object of sale is to pay debts.

In such cases, if the purpose of the sale is to pay debts, the executor is the person to sell. *Anon.* 3 Dyer, 371 b; *Blatch v. Wilder*, 1 Atk. 420; *Forbes v. Peacock*, 11 M. & W. 630; see *Hooper v. Strutton*, 12 W. R. 367.

Proceeds of sale mixed with personalty.

The same is the case, if the proceeds of sale are to be divided with the personalty in certain shares, though there may be no charge of debts. *Tylden v. Hyde*, 2 S. & St. 238; *Ward v. Devon*, cit. 11 Sm. 160; *Forbes v. Peacock*, 11 M. & W. 630; 1 Ph. 717.

Direction to sell and divide.

But a mere direction to sell lands and divide the proceeds, where they are not mixed with the personalty, or a direction in certain events to sell lands which are directly devised, gives the executors no power of sale. *Bentham v. Wiltshire*, 4 Mad. 44; *Patton v. Randall*, 1 J. & W. 189; *Allum v. Fryer*, 3 Q. B. 442; *Curtis v. Fulbrook*, 8 Ha. 25, 278; *Haydon v. Wood*, *ib.* 279. See, however, *Lockton v. Lockton*, 1 Ch. C. 179.

Power of sale implied from charge of debts.

The question, whether a charge of debts on land gives the executors a power of sale has become of small importance since Lord St. Leonards' Act, 22 & 23 Vict. c. 35, ss. 14—18, which applies to wills coming into operation after the 13th August, 1859.

Lord St. Leonards' Act, secs. 14, 16, and 18.

Sections 14 and 16 in effect enact, that devisees in trust of the testator's whole interest in real estate charged with debts or legacies, no provision being made for the raising such debts or legacies, may raise the same by sale or mortgage, and where the estate subject to the charge is



not devised to trustees for the testator's whole interest, the executors have a similar power of raising the amount.

The 16th section does not enable an administrator to sell. *In re Clay & Tetley*, 16 Ch. D. 3.

Section 18 declares that the said sections of the Act shall not extend to a (beneficial) devise to any person or persons in fee or in tail, or for the testator's whole estate and interest charged with debts or legacies, nor shall they affect the power of any such devisee or devisees to sell or mortgage, as he or they may by law now do.

In cases where this Act does not apply the law is not in a very satisfactory state.

1. Where debts and legacies are charged on land, and the land is devised to trustees upon trusts not including the payment of debts, the trustees and not the executors are apparently the persons to sell and receive the purchase money. *Shaw v. Borrer*, 1 Kee. 559; *Ball v. Harris*, 4 M. & Cr. 264; *Stroughill v. Anstey*, 1 D. M. & G. 647; *Sabin v. Heape*, 27 B. 553; *Hodkinson v. Quinn*, 1 J. & H. 303.

Will not within the Act.

Devise to trustees of land subject to a general charge of debts.

In such a case the fact that the trustees take only an estate *pur autre vie*, the use in remainder being executed by the effect of the Statute of Uses, will not affect their power to sell in order to raise the charge. *Eidsforth v. Armstead*, 2 K. & J. 333.

2. When there is a charge of debts and legacies on land, and the land is devised beneficially, expressly subject to the charge, to a person who is one of several executors, he can sell and pass the legal estate. *Colyer v. Finch*, 5 H. L. 905; *Corsser v. Cartwright*, 8 Ch. 971; L. R. 7 H. L. 731.

Beneficial devise subject to debts to a person who is also executor.

3. And the case would apparently be the same where the devisee, who takes subject to the express charge, is not an executor. See *Corsser v. Cartwright*, 8 Ch. 971, 975.

Similar devise to person not executor.

The time within which a power to sell real estate implied by a charge of debts must be presumed by a purchaser to be still subsisting without his having the right to make enquiry as to whether any debts still remain unpaid is 20 years - Tangeray v. Williams

Whether a general charge of debts on land gives the executor a power of sale.

4. When there is a charge of debts and legacies on land, and the land is beneficially devised or not devised at all, so that there is a difficulty how the charge is to be enforced, it would seem that *prima facie* the executor has no power to sell the land. This is the result both of the general principle of the cases and of the only authority where the exact point arose for decision. *Doe v. Hughes*, 6 Ex. 223: see *Gosling v. Carter*, 1 Coll. 644.

On the other hand an intention may be collected from the will, that the executor, and not the devisee, was intended to enforce the charge, in which case the power of sale would include the power of passing the legal estate as well.

Thus, if the land is devised for life with contingent remainders over, it is clear that the devisees cannot make a good title; yet, on the other hand, the charge must be raised at once, and therefore a power of sale is implied in the executor. *Robinson v. Lowater*, 5 D. M. & G. 275.

Where a testator directs his debts to be paid by his executors, and charges them on his real estate, a power of sale by implication will not be given to an administrator. *In re Clay & Tetley*, 16 Ch. D. 3.

The above seems to be the effect of the actual decisions on this vexed point. Lord Romilly, however, in numerous cases, has given his opinion that a charge of debts on land, where the land is beneficially devised, gives the executors an implied power of sale.

It may, perhaps, be doubted whether the cases expressed to be decided by him on this ground may not be supported upon other principles; see the cases already cited. *Wrigley v. Sykes*, 21 B. 337, might, perhaps, be upheld on the ground that an express trust to pay debts and legacies was imposed upon the executors, who were also devisees subject to a term.

At the same time it must be admitted that that case is a strong authority for the proposition that a mere charge of debts gives the executors a power of sale over realty; see, too, *Bolton v. Stannard*, 4 Jur. N. S. 576. But in all probability a court even of co-ordinate jurisdiction would find no difficulty in declining to follow *Wrigley v. Sykes* on the authority of *Doe v. Hughes*, unless it were possible to confine the decision in the latter case to the mere question of the legal estate, which, however, would be contrary to the express terms of the judgments delivered.

For the opinions of the text-writers on this subject, see Sugd. V. & P. 13th ed. 545; Pow. 121—2; Williams on Real Assets, ch. vi. p. 77; Davidson's Conv. vol. ii. 989 n.; Dart. V. & P. 619, seq.; Lewin on Trusts, 402, seq.; Hayes & Jarman's Conc. Prec. 564; Farwell on Powers, 57; Shelford's Real Property Statutes, 484; Godefroi on Trustees, 127.

There can be no reasonable doubt, that a power to mortgage authorises a mortgage with power of sale. By 23 & 24 Vict. c. 145, s. 11, a power of sale is expressly given to mortgagees. *In re Chawner's Will*, 8 Eq. 569, overruling *Clark v. Royal Panopticon*, 4 Dr. 26.

Under a power to raise a sum by way of mortgage, the costs of effecting the security may be raised. *Armstrong v. Armstrong*, 18 Eq. 541.

By Lord St. Leonards' Act, 22 & 23 Vict. c. 35, s. 23, a power of giving receipts is conferred upon all persons, to whom any purchase or mortgage money shall be payable upon any express or implied trust, unless the contrary shall be expressly declared by the instrument creating the trust.

The latter words of the section appear to show that it is intended to apply only to instruments executed after the passing of the Act, the 13th August, 1859 (see *Prideaux Conv.* vol. ii. 118; Lewin, p. 394; but see *Bennett v. Lytton*, 2 J. & H. 158.

II. Power to mortgage.

III. Power of giving receipts.

Lord Cran-  
worth's  
Act.

By Lord Cranworth's Act, 23 & 24 Vict. c. 145, s. 29, which applies to wills executed or confirmed after the 28th August, 1860, trustees are empowered to give receipts for any money payable to them by reason or in exercise of any trusts or powers reposed or vested in them.

The old law upon the question, in what cases a power of giving receipts is to be implied, is now of little importance. See *Godefroi on Trustees*, 125; *Elliot v. Merryman*, 1 Wh. & T. L. C. 64.

Effect of  
charge of  
debts.

It may be noticed here, that it was clearly settled, that a power of giving receipts is to be implied from a charge of debts, whether in fact any debts exist at the testator's death or not. *Forbes v. Peacock*, 1 Ph. 717.

Receipt by  
agent.

It would seem that trustees entitled to receive money may authorise an agent to receive it for them. The contrary view would cause such practical inconvenience, that it is hardly likely to be adopted by the Courts. *Hope v. Liddell*, 21 B. p. 202; *Robertson v. Armstrong*, 28 B. 123; see, however, *Dart*, 657; *Lewin*, 413.

In the two cases above cited the person paying the money to the agent received a receipt from the trustees; but it would seem that a receipt, signed by the agent under a power of attorney from the trustees, would be a valid discharge to the person paying the money.

IV. Exe-  
cutor's  
power of  
sale.

An executor may sell or mortgage any part of the testator's personal assets. *Earl Vane v. Rigden*, 5 Ch. 663; *Cruikshank v. Duffin*, 13 Eq. 555; *Berry v. Gibbons*, 8 Ch. 747.

An administrator *durante minore ætate* has the same power of selling personal property as an executor. *In re Cope*, 16 Ch. D. 49; not following *In re Robinson*, 3 L. R. Ir. 429.

Debts contracted by an executor, though for the purposes of the estate, are the executor's debts, and cannot be proved against the estate. *Farhall v. Farhall*, 7 Ch. 123.

V. Con-  
version of

Where there is a trust for conversion unauthorised

securities should, as a general rule, be sold within a <sup>personalty within a</sup> year from the death. *Bute v. Hooper*, 5 D. M. & G. 338 ; year.  
*Hughes v. Empson*, 22 B. 181.

But executors, who *bond fide* postpone the sale of securities of fluctuating value, upon which there is no liability, will not be liable for a loss. *Burton v. Burton*, <sup>Where postpone-ment of conversion justified.</sup> 1 M. & Cr. 80 ; *Marsden v. Kent*, 5 Ch. D. 598.

Shares, upon which there is an unlimited liability, ought to be sold within the year under a direction to convert. *Grayburn v. Clarkson*, 3 Ch. 605 ; *Sculthorpe v. Tipper*, 13 Eq. 232.

If there is a discretionary trust to convert, trustees *bond fide* exercising their discretion will not be liable for not selling shares upon which the liability is unlimited. *In re Norrington ; Brindley v. Partridge*, 13 Ch. D. 655.

The cases upon investment will be found collected in <sup>VI. Investment.</sup> Godefroi on Trustees, 131 ; Lewin, 270 ; Dunning Prec. 104—108.

Under the common power of investing with consent a previous consent is necessary, and it must be given at the time of the investment, and cannot be given by anticipation. *Bateman v. Davis*, 3 Mad. 98 ; *Child v. Child*, 20 B. 50.

If the consent is to be signified by deed, the deed may be executed after the exercise of the power, if consent has been previously given. *Offen v. Harman*, 1 D. F. & J. 253.

Trustees cannot in the absence of express powers grant leases. *In re Shaw's Trusts*, 12 Eq. 124, overruling <sup>VII. Powers of leasing.</sup> *Naylor v. Arnitt*, 1 R. & M. 501.

An executor can make a lease, but if impugned by a beneficiary it would lie upon the executor and lessee to show that it was made in a due course of administration. <sup>Lease by executor.</sup> *Keating v. Keating*, Ll. & G. t. Sug. 133.

If an executor makes a lease giving the lessee an option to purchase at a fixed price, the option to purchase cannot <sup>Lease with option to purchase.</sup>

be exercised against the beneficiaries. *Oceanic Steam Navigation Co. v. Sutherland*, 16 Ch. D. 236.

Lease of  
several  
properties.

In the absence of any special circumstances trustees of contiguous estates held upon different trusts cannot make a lease of both estates under one demise. *Tolson v. Sheard*, 5 Ch. D. 10.

Power to  
lease not  
acceler-  
ated.

A power to lease after the death of a tenant for life cannot be exercised before his death, though the life estate may be surrendered. *Coxe v. Day*, 13 East, 118.

VIII.  
Carrying  
on busi-  
ness.

Executors or trustees cannot carry on the testator's business without express authority to do so. *Travis v. Milne*, 9 Ha. 142; *Kirkman v. Booth*, 11 B. 273.

What  
capital  
may be  
employed.

A direction to carry on the testator's business only authorises the employment in the business of the capital, which the testator himself employed in the business at his decease. *M'Neillie v. Acton*, 4 D. M. & G. 744.

An authority to trustees to carry on the business does not authorise two out of three trustees to carry it on. *Ex parte Butcher*; *In re Mellor*, 13 Ch. D. 465.

Effect of  
direction  
to carry on  
business.

If the executor has power to carry on the testator's business, the debts incurred are primarily the debts of the executor, but the executor is entitled to be indemnified out of the estate to the extent of the assets authorised by the will to be employed in trade.

If the executor is insolvent the creditors are entitled to stand in his place against the assets of the testator. *Ex parte Garland*, 10 Ves. 110; *Ex parte Richardson*, Buck. 202; 3 Mad. 138; *Scott v. Izon*, 34 B. 434; *M'Neillie v. Acton*, 4 D. M. & G. 744; *Owen v. Delamere*, 15 Eq. 134; *Hall v. Fennell*, I. R. 9 Eq. 406, 615; *Fairland v. Percy*, 3 P. & D. 217.

The creditors are only entitled to stand in the place of the executor, and are subject to all equities subsisting between him and the estate. *In re Johnson*; *Shearman v. Robinson*, 15 Ch. D. 548.

If the business is carried on without authority by the executor of a deceased partner, the assets which remain in specie are applicable towards payment of the creditors of the old firm, and the doctrine of order and disposition does not apply. *Ex parte Butcher*; *In re Mellor*, 13 Ch. D. 465.

Rights of creditors where business carried on without authority.

If a tenant for life is allowed to carry on the testator's business without authority, but the financial part of the business is carried on through an account in the name of the executors, creditors of the tenant for life are entitled to his life interest only in the stock of the testator remaining in specie, or in stock replacing the original stock. *Ex parte Barber*; *In re Onslow*, 28 W. R. 522.

Tenant for life carrying on business.

On the other hand, if an executor, who is also residuary legatee, carries on the business without authority the assets belong to the creditors of the executor. *In re Fells*; *Ex parte Andrews*, 4 Ch. D. 509.

Under the statutory power of maintenance conferred on trustees by 23 & 24 Vict. c. 145, s. 26, it would seem that trustees might apply money towards the maintenance of infants, irrespective of the question whether there is any other fund applicable for the purpose, or whether the father is able to maintain them. See *Culbertson v. Wood*, I. R. 5 Eq. 23; see, too, p. 140, *ante*.

IX. Power of maintenance.

If the will expressly directs maintenance notwithstanding the ability of the father to maintain the children, or the trustees have an absolute and uncontrolled discretion, the Court will not, as a rule, interfere with the discretion of the trustees. *Brophy v. Bellamy*, 8 Ch. 798; *Gisborne v. Gisborne*, 2 App. C. 300; *Tabor v. Brooks*, 10 Ch. D. 273.

Discretion when not interfered with.

But if a discretion and no more is given to the trustees, the Court will control the trustees, if the discretion is not soundly exercised. *In re Hodges*; *Davey v. Ward*, 7 Ch. D. 754; *In re Roper's Trust*, 11 Ch. D. 272. See *Warnford v. Heyl*, 20 Eq. 321.

Upon  
what  
principle  
trustees  
should  
allow  
main-  
tenance.

If the statutory powers are not applicable, and the will contains a simple power of maintenance, it would seem that trustees ought to apply money to maintenance only upon the principles followed by the Court.

That is to say, they ought to allow maintenance only if the father is not able to maintain the infants. *Hughes v. Hughes*, 1 B. C. C. 387; *Lucknow v. Brown*, 12 Jur. 1017.

Of course if the interest is expressly given to the father for maintenance this rule does not apply.

Nor does it apply where some of the children are excluded from a share in the fund, so that to refuse maintenance would be to diminish the fund the father has for children unprovided for. *Hoste v. Pratt*, 3 Ves. 730.

Mainte-  
nance  
includes  
education.

Under a power to apply money towards the maintenance or support of infants, sums may be expended in education. *In re Breed's Will*, 1 Ch. D. 227.

Sums ex-  
pended  
without  
authority.

A trustee, who has without authority expended sums for the maintenance of an infant, will be allowed all such sums as the Court would have authorised if it had been applied to. *Brown v. Smith*, 10 Ch. D. 377.

When  
father  
entitled  
to past  
income.

Where a father has maintained his children, he will not be entitled to past income, which might have been applied by trustees towards their maintenance, if the income is given by the bounty of a testator. *In re Kerrison's Trusts*, 12 Eq. 422.

Rule in  
marriage  
settle-  
ments.

In the case of a marriage settlement the rule is different. If there is a trust to apply income for maintenance, the trustees having only a discretion as to the amount, an inquiry will be directed as to how much should have been applied, and to this the father will be entitled. *Mundy v. Earl Howe*, 4 B. C. C. 223; *Meacher v. Young*, 2 M. & K. 490; *Stocken v. Stocken*, 4 M. & Cr. 95; *Ransome v. Burgess*, 3 Eq. 773.

This principle does not apply to marriage settlements



which contain only a power to maintain. *Thompson v. Griffin*, Cr. & P. 317.

It seems that accumulations of income may be applied in subsequent years without express authority. *Edwards v. Grove*, 2 D. F. & J. 210.

Powers of advancement are not, in the absence of express words, to be confined to minority. *Clarke v. Hogg*, 19 W. R. 617. X. Power of advancement.

A power of advancement would not justify the payment of a sum to a beneficiary merely to put into his own pocket. But it would justify the payment of a sum for the purpose of making a settlement on the family of the beneficiary if he has no property producing income. *Roper Curzon v. Roper Curzon*, 11 Eq. 452.

Such a power would not justify a payment to the husband of a beneficiary without some security for the repayment of the amount. *Talbot v. Marshfield*, 3 Ch. 622; *In re Kershaw's Trusts*, 6 Eq. 322. Payment to husband.

A power to apply a sum for the preferment, advancement, or otherwise for the benefit of a legatee authorises the payment of his debts. *Louther v. Bentinck*, 19 Eq. 166. Payment of debts.

An indemnity clause providing that any trustee enabling his co-trustee to receive any moneys should not be liable to see to the application thereof has been held to protect a trustee against misappropriation of the trust fund by his co-trustee. *Wilkins v. Hogg*, 3 Giff. 116; 10 W. R. 47; *Pass v. Dundas*, 29 W. R. 332. XI. Indemnity.

## CHAPTER XXXI.

## ABSOLUTE INTERESTS IN PERSONALTY.

I. BEQUESTS OF PERSONALTY WITH WORDS OF  
LIMITATION.

Bequest to A. and his executors or representatives. 1. It is clear that a bequest to A. and his executors, or to A. and his representatives, gives A. the absolute interest, the additional words being merely words of limitation. *Lugar v. Harman*, 1 Cox, 250; *Taylor v. Beverley*, 1 Coll. 108; *Appleton v. Rowley*, 8 Eq. 139.

Bequest to A. for life and then to his executors. So, too, a gift to A. for life, and then to his executors or administrators, or to his personal representatives, gives A. the absolute interest. *A.-G. v. Malkin*, 2 Ph. 64; *Saberton v. Skeels*, 1 R. & My. 587; *Alger v. Parrot*, L. R. 3 Eq. 328; *Avern v. Lloyd*, 5 Eq. 383; *Wing v. Wing*, 24 W. R. 878.

It is of course immaterial, that the life interest is determinable. *Webb v. Sadler*, 14 Eq. 533; 8 Ch. 419.

In what case the executors take beneficially. If, however, the gift is to A. for life, and then to his executors or administrators for their own use and benefit, they will take beneficially. *Sanders v. Franks*, 2 Mad. 147; *Wallis v. Taylor*, 8 Sim. 241.

But the intention that the executors are to take beneficially must be unmistakeably plain. *Stocks v. Dodsley*, 1 Keen, 325.

A gift to A. for life with power to appoint by will and in default of appointment to his executors and administrators, gives an absolute interest and entitles the donee to

immediate payment, and it is apparently not necessary that the power should be released. *Devall v. Dickens*, 9 Jur. 550 ; *Page v. Soper*, 11 Ha. 321.

2. A bequest of personalty to a man and his heirs would no doubt pass the absolute interest. Bequest to A. and his heirs.

So, too, a bequest to A. and the heirs of his body gives A. an absolute interest in personalty. *Leventhorpe v. Ashbie*, Rolle's Ab. 831, pl. 1 ; *Seale v. Seale*, 1 P. W. 290. Bequest to A. and the heirs of his body.

It seems that in wills before the Wills Act, if the gift is to A. for life, and if he die without issue over, an absolute interest will not be given to A. by implication, though if the property had been real estate, A. would have taken an estate tail. *Procter v. Upton*, cit. 5 D. M. & G. 199 n. ; *In re Banks' Trust* ; *Ex parte Hovill*, 2 K. & J. 387 ; see *A.-G. v. Bayley*, 2 B. C. C. 553 ; *Chandless v. Price*, 3 Ves. 98 ; *Bodens v. Lord Galway*, 2 Ed. 297. Bequest to A. for life and if he dies without issue over before the Wills Act.

On the other hand, a gift to A. for life and then to the heirs of his body, and if he die without issue over, gives A. an absolute interest. *Butterfield v. Butterfield*, 1 Ves. sen. 133 ; *Theebridge v. Kilburne*, 2 Ves. sen. 233 ; *Williams v. Lewis*, 3 Dr. 669 ; 6 H. L. 1013 ; see, too, *Elton v. Eason*, 19 Ves. 73 ; *Garth v. Baldwin*, 2 Ves. sen. 646 ; *Tothill v. Pitt*, 1 Mad. 488 ; 7 B. P. C. 453 ; *Brouncker v. Bagot*, 19 Ves. 574 ; 1 Mer. 271. Bequest to A. for life and then to the heirs of his body followed by a gift over.

Of course if, in wills before the Wills Act, the gift over upon failure of issue can be limited to failure of issue at the death of the tenant for life, a prior gift to A. and the heirs of his body gives A. an interest defeasible upon failure of issue at his death. *Read v. Snell*, 2 Atk. 642 ; *Hodgeson v. Bussey*, 2 Atk. 89 ; *Paine v. Stratton*, 2 Atk. 647 ; 3 B. P. C. 257 ; *Fearne*, C. R. 494.

In these cases the testator has shown a clear meaning, that the property should go in a course of devolution, till there is an exhaustion of heirs of the body ; and, as this intention cannot be carried into effect, the Court gives

an absolute interest in personalty. See *Ex parte Wynch*, 5 D. M. & G. 188.

In what cases heirs of the body will be a word of limitation in bequests since the Wills Act.

But if such an intention is not manifested, it seems that the Courts will be unwilling to apply the rules of tenure to personal estate, and it must be collected from the general language of the will, whether the words heirs and heirs of the body are intended to be words of limitation or purchase.

Thus, if the bequest is to A. for life, and after her decease to her heirs as she shall give it by will, and if she die without a will to her right heirs for ever, the term right heirs is equivalent to executors and administrators. *Powell v Boggis*, 35 B. 535.

So if the intention is to create a succession of estates, as in a gift to A. for life and after his decease to the heirs male of his body, and so in succession, A. takes an absolute interest. *Britton v. Twining*, 3 Mer. 176; see *Cleary's Trust*, 16 Ir. Ch. 438; *Sparling v. Parker*, 29 B. 450.

Words of distribution super-added make the word heirs a word of purchase.

But if there is anything to show that the heirs were to take by purchase; if, for instance, they are to take as tenants in common, the life estate will not be enlarged, whether there is a gift over in default of issue or not. *Bull v. Comberbach*, 25 B. 540; *Jacobs v. Amyott*, 4 B. C. C. 542; *Jeaffreson's Trust*, L. R. 2 Eq. 276.

So, too, in a gift to A. for life with a direction that he was to have no power over the property beyond its legal vestment for conveyance, &c., and after his decease to his heirs, A. took only a life interest in the personalty, though he took the realty in fee. *Herrick v. Franklin*, 6 Eq. 593; see *Comfort v. Brown*, 10 Ch. D. 146.

Whether the same construction will be adopted as regards realty and personalty

The better opinion seems now to be, that the Court will not shrink from giving a different construction to the words heirs and heirs of the body as regards realty and personalty, though given together in the same clause. *Herrick v. Franklin*, *supra*.

3. The word issue is less "mysteriously inflexible" <sup>where they are given together.</sup> than the words heirs of the body, and therefore in a gift of personalty to A. and his issue it may be a word of limitation or of purchase, in which latter case the same question arises as in gifts to A. and his children, whether A. and the issue take jointly or whether the issue take subject to a life interest in A.

a. *Prima facie* it seems a gift of personalty to A. and his issue, as it would give A. an estate tail in realty, gives him an absolute interest in personalty. This seems clear, when there is a gift over in default of issue, for the limitation over shows, that the gift is meant to extend to all the issue, and all the issue might not be capable of taking jointly with the parent. *Lyon v. Michell*, 1 Mad. 467; *Beaver v. Nowell*, 25 B. 551; *Re Andrews' Will*, 27 B. 608; *Donn v. Penny*, 1 Mer. 20; 19 Ves. 544; *Gibbs v. Tait*, 8 Sim. 132. Bequests to a person and his issue.

And apparently the same rule will hold good even where there is no gift over. *Harvey v. Towell*, 7 Ha. 231; *Samuel v. Samuel*, 9 Jur. 222; *Prentice v. Brooke*, 5 L. R. Ir. 435; but *quære*.

The case is stronger in favour of this construction, if it is a gift of realty and personalty together, or if personalty is directed to go in the same way as realty. *Parkin v. Knight*, 15 Sim. 83; *Tate v. Clarke*, 1 B. 100.

b. If, however, there is any evidence, that the testator did not use the word as a word of limitation, by the use of expressions implying, either that the parent and issue take concurrently: *Clay v. Pennington*, 7 Sim. 370; *Lau v. Thorp*, 27 L. J. Ch. 649; or that the issue take after the parent's death as purchasers: *Lampley v. Blower*, 3 Atk. 396; *Parsons v. Coke*, 4 Dr. 296; or that they are to take by substitution, by directing, for instance, that the issue are to take *per stirpes*: *Butter v. Ommaney*, 4 Russ. 70; *Pearson v. Stephen*, 5 Bl. N. S. 203; *Dick v.* In what cases issue will be a word of purchase.

*Lacy*, 8 B. 214; *Re Stanhope's Trusts*, 27 B. 201, the issue will take by purchase.

Bequests  
to A. for  
life and  
then to  
his issue.

c. If the gift of personalty is to A. for life and then to his issue, whether there is a gift over in default of issue or not, A. takes only an estate for life. *Knight v. Ellis*, 2 Bro. C. C. 569; *Ex parte Wynch*, 5 D. M. & G. 188; *Goldney v. Crabb*, 19 B. 338; *Foster v. Wybrants*, 1 R. 11 Eq. 40.

And the same rule applies with regard to the personalty, where real and personal property are given together, unless there is something to show that the personalty was to go in the same manner as the realty.

"Except in a case where the personalty is either quite subordinate in value or a mere adjunct of the realty, as, for example, a leasehold garden held together with a freehold house, it is very difficult to give any sound logical reason for the proposition, that an intention that the two kinds of property should go together ought to carry the whole in accordance with the rules applicable to realty rather than with those which would apply to a bequest of personalty alone." *Per Lord Hatherley, Jackson v. Calvert*, 1 J. & H. 235.

But, though only a life estate may be given to the ancestor, if the issue are to take successively according to seniority, and not conjointly, issue will be treated as a word of limitation. *Jordan v. Lowe*, 6 B. 350.

## II. GIFTS OF THE INCOME OF PROPERTY INDEFINITELY.

A gift of the income of property to a person, without limitation as to time, is a gift of the capital, where no other disposition of the capital is made.

Gift of  
income  
without  
more is a

This is the case, though the gift may be to the separate use, or through the medium of a trust. *Elton v. Shepherd*, 1 B. C. C. 532; *Phillips v. Chamberlayne*, 4 Ves. 51;

*Rawlings v. Jennings*, 13 Ves. 39; *Boosey v. Gardner*, gift of corpus. 18 B. 471; *Haig v. Swiney*, 1 S. & St. 487; *Humphrey v. Humphrey*, 1 Sim. N. S. 536; *Watkins v. Weston*, 32 B. 238; 3 D. J. & S. 434; *Penny v. Pippin*, 15 W. R. 306.

A gift of income during widowhood is a gift for life or during widowhood; but a gift of income to a legatee so long as she should continue single and unmarried has been held to be an absolute interest if the legatee did not marry. *Rishton v. Cobb*, 5 M. & Cr. 145.

In the same way a gift of the income of property, with a power superadded of disposing of it by will, is an absolute interest. *Southouse v. Bate*, 16 B. 132; *Weale v. Olive*, 32 B. 421.

The fact, that legacies are given at the decease of the person, to whom the income is given indefinitely, will only cut down the absolute interest to the extent of the legacies. *Jennings v. Baily*, 17 B. 118.

Upon similar principles a gift of income to A. for life, and then to B. indefinitely, gives B. the absolute interest. *Clough v. Wynne*, 2 Mad. 188.

But a gift of income to B. and C. and the survivor of them gives them only life interests. *Blann v. Bell*, 2 D. M. & G. 775. <sup>Contrary intention.</sup>

### III. PROPERTY AND POWER.

1. A gift to be at the disposal of A. is an absolute gift. *Nowlan v. Walsh*, 4 De G. & S. 584; *Re Maxwell's Will*, 24 B. 246; *Hoy v. Master*, 6 Sim. 568; *Kellett v. Kellett*, L. R. 3 H. L. 160. <sup>Gift to be at the disposal of a person</sup>

The same construction has been adopted where property has been directed to be at the disposal of A. by will, or after his death. *Robinson v. Dugate*, 2 Ver. 180; *Hixon v. Oliver*, 13 Ves. 108.

2. If there is a gift to A. in general terms, a superadded Effect of a

power  
super-  
added to  
an absolute  
gift.

power to dispose of the property in question by will, or at the donee's death, does not cut down the absolute gift. *Southouse v. Bate*, 16 B. 132 ; *Weale v. Ollive*, 32 B. 421 ; *Comber v. Graham*, 1 R. & M. 450 ; *Re Mortlock's Trust*, 3 K. & J. 456. See *Hales v. Margerum*, 3 Ves. 299 ; and *Bull v. Kingston*, 1 Mer. 314.

So a devise of lands in fee to the intent that the devisee may enjoy the same for life and by will dispose of the same, gives the devisee the fee. *Doe d. Herbert v. Thomas*, 3 A. & E. 123.

And even a superadded power to dispose of the property among a particular class will not cut down the absolute interest previously given. *Howorth v. Dewell*, 29 B. 18 ; *Brook v. Brook*, 3 Sm. & G. 280 ; *Reeves v. Baker*, 18 B. 372.

Of course a mere power to dispose of property among a certain class gives no property to the donee of the power. *Birch v. Wade*, 3 V. & B. 198 ; *Blakeney v. Blakeney*, 6 Sim. 52. See *Acheson v. Fair*, 3 Dr. & War. 512.

Effect of a  
power  
super-  
added  
to a life  
interest.

3. But if the gift is to A. for life, with a superadded power to dispose of the whole for his own benefit, A. takes only a life interest if he does not exercise the power. *Archibald v. Wright*, 9 Sim. 161 ; *Bradley v. Westcott*, 13 Ves. 445 ; *Reith v. Seymour*, 4 Russ. 263 ; *Scott v. Josselyn*, 26 B. 174 ; *Pennock v. Pennock*, 13 Eq. 144 ; *In re Stringer's Estate* ; *Shaw v. Ford*, 6 Ch. D. 1 ; *In re Thomson's Estate* ; *Herring v. Barrow*, 14 Ch. D. 263.

In such a case the presentation of a petition for payment out of Court amounts to an appointment, and entitles the legatee absolutely. *Holloway v. Clarkson*, 2 Ha. 521 ; *Cambridge v. Rouse*, 25 B. 574 ; *David's Trusts*, Johns. 495.

And when the tenant for life has power to go to the principal, only if the income is insufficient, she is entitled only to so much of the capital as will afford a suitable maintenance. *Re Pedrotti's Will*, 27 B. 583.



#### IV. EFFECT OF SUBSEQUENT RESTRICTIONS UPON ABSOLUTE INTERESTS.

In some cases there is an absolute gift in the first instance, out of which particular interests are subsequently carved. In such cases the rule is:—

“If a testator leave a legacy absolutely as regards his estate, but restricts the mode of the legatee’s enjoyment of it to secure certain objects for the benefit of the legatee, upon failure of such objects the absolute gift prevails. But if there be no absolute gift as between the legatee and the estate, but particular modes of enjoyment are prescribed, and those modes of enjoyment fail, the legacy forms part of the testator’s estate, as not having in such event been given away from it. In the latter case the gift is only for a particular purpose; in the former the purpose is the benefit of the legatee as to the whole amount of the legacy, and the directions and restrictions are to be considered as applicable to a sum no longer part of the testator’s estate, but already the property of the legatee.” *Per* Lord Cottenham, *Lassence v. Tierney*, 1 Mac. & G. 551.

Absolute interests cut down for a particular purpose remain so far as those purposes do not take effect.

Thus, if there is an absolute gift by a will, and restrictions are imposed upon the legatee’s enjoyment by a codicil, the absolute gift remains so far as the restrictions do not extend. *Norman v. Kynaston*, 3 D. F. & J. 29; *Watkins v. Weston*, 3 D. J. & S. 434.

So when there is a valid appointment to objects of a power, with limitations or restrictions which are beyond the power, the invalid restrictions may be rejected. *Stephen v. Gadsden*, 20 B. 463; *Gerrard v. Butler*, *ib.* 541; *Churchill v. Churchill*, 5 Eq. 44; *Webb v. Sadler*, 14 Eq. 533; 8 Ch. 419.

But where there is no absolute gift, the legatees can

take no more than is given them. *Savage v. Tyers*, 7 Ch. 356.

What is an absolute gift in the first instance.

The difficulty in these cases lies in ascertaining, whether there is an absolute gift in the first instance or not. The question is whether the original gift is qualified by the words in which it is given: *Scawin v. Watson*, 10 B. 200; *Gompertz v. Gompertz*, 2 Ph. 107; *Lassence v. Tierney*, 1 Mac. & G. 551; *Harris v. Newton*, 25 W. R. 228; 46 L. J. Ch. 268; or whether there is an independent gift, with a direction as to the mode of its enjoyment. *Campbell v. Brownrigg*, 1 Ph. 301; *Whittell v. Dudin*, 2 J. & W. 279; *Winckworth v. Winckworth*, 8 B. 576; *Mayer v. Townshend*, 3 B. 443; *McTear v. McDowell*, 11 Ir. Ch. 338; *Welply v. Cormick*, 16 Ir. Ch. 74; *Kellett v. Kellett*, L. R. 3 H. L. 160.

Power and trust.

When an absolute interest is cut down to a life estate, with a power of appointment among children, this does not mean that the absolute interest is to be cut down, only if the donee appoints, but if there are children the donee is bound to appoint to them. *Butler v. Gray*, 5 Ch. 26.

## V. GIFTS BENEFICIAL OR IN TRUST.

On the question whether a gift is beneficial or in trust, the cases are numerous. The inclination of the Courts is not to construe doubtful words into a declaration of trust, and many of the earlier cases in which a trust has been held to be created would probably now be differently decided.

Words sufficient to create a trust.

A. A gift to a person for some particular purpose, whether declared or not, creates a trust. *Corporation of Gloucester v. Wood*, 3 Ha. 131; 1 H. L. 272; *Aston v. Wood*, 6 Eq. 419; see *Barrs v. Fewkes*, 2 H. & M. 60; 12 W. R. 666; 13 W. R. 987.

So, too, the words "to the intent" create a trust. *Raikes v. Ward*, 1 Ha. 445.

And where an executrix had received a legacy for her trouble, a bequest of the residue to her, "well knowing that she will make a good use and dispose of it in a manner in accordance with my views and wishes," was held to be in trust. *Briggs v. Penny*, 3 De G. & Sm. 525; 3 Mac. & G. 546; *Bernard v. Minshull*, Johns. 276; see *Stead v. Mellor*, 5 Ch. D. 225.

B. The cases are more difficult, where the intention is to give the donee a beneficial interest, but there is a recommendation to apply the property for the benefit of certain objects. In such cases the Court will imply a trust if the property to be subject to, and the objects to be benefited by, the implied trust are sufficiently certain. Precatory trusts.

1. It must be clear that the testator intends the property he has bequeathed, or some part of it, to be applied by the donee for the purposes of the trust. It must be clear what property is to be subject to the trust.

a. Therefore mere expressions of a desire that the donee will be kind to: *Buggins v. Yates*, 9 Mod. 122; 8 Vin. Ab. 72, pl. 27; remember: *Bardswell v. Bardswell*, 9 Sim. 319; consider: *Sale v. Moore*, 1 Sim. 534; deal justly by: *Pope v. Pope*, 10 Sim. 1; educate and provide for: *Macnab v. Whitbread*, 17 B. 299; *Winch v. Brutton*, 14 Sim. 379; *Fox v. Fox*, 27 B. 301; or do justice to: *Ellis v. Ellis*, 23 W. R. 382, a certain class of persons will raise no trust.

b. Though some property may be mentioned out of which the trust is to be performed, this is not enough, if it is not clear what the property is; as if the donee is requested to give "whatever she can transfer:" *Flint v. Hughes*, 6 B. 342; or the bulk: *Palmer v. Simmonds*, 2 Dr. 221; or if the precatory words apply not only to the property given by the testator, but to all the property of the legatee: *Eade v. Eade*, 5 Mad. 118; *Lechmere v. Lavie*,

2 M. & K. 197; *Parnall v. Parnall*, 9 Ch. D. 96. See *Knight v. Boughton*, 3 B. 148; 11 Cl. & F. 513.

c. As there can be no gift over of what a legatee does not dispose of, so no trust will be fixed upon it. *Bland v. Bland*, 2 Cox, 349; *Wilson v. Major*, 11 Ves. 205; *Pushman v. Filliter*, 3 Ves. 7; *Cowman v. Harrison*, 10 Ha. 234; *Green v. Marsden*, 1 Dr. 646.

Request to  
employ a  
person as  
agent.

d. Upon similar principles a request that a particular person may be employed as manager or receiver of the testator's property is not obligatory. *Shaw v. Lawless*, 5 Cl. & F. 129; *Finden v. Stephens*, 2 Ph. 142.

Though, on the other hand, the express appointment by the testator of a particular person as agent or receiver will have effect given to it. *Hibbert v. Hibbert*, 3 Mer. 681; *Williams v. Corbet*, 8 Sim. 349; see *Belaney v. Kelly*, 19 W. R. 1171.

The  
objects of  
the trust  
must be  
reasonably  
certain.

2. If the donee has a wide discretion as to the objects to be benefited, so that it is uncertain whom the testator meant, the Court will infer that precatory words were not intended to create an imperative trust. *Bernard v. Minshull*, Jo. 276, 287.

a. Thus, where there is absolute power of disposal, with a confidence expressed, that the donee will dispose of the property according to the testator's wishes, where none are expressed, there is no trust. *Reid v. Atkinson*, I. R. 5 Eq. 162, 373; *Creagh v. Murphy*, I. R. 7 Eq. 182.

b. Though words are used, such as "family," "relations," or "heirs," to which the Court would give a meaning in a direct gift, no trust will be implied if it is uncertain what the testator meant by them. *Harland v. Trigg*, 1 B. C. C. 141; *Wright v. Atkyns*, 17 Ves. 255; 1 V. & B. 313; 19 Ves. 299; T. & R. 162; Sug. Prop. 388; *Williams v. Williams*, 1 Sim. N. S. 358; *Green v. Marsden*, 1 Dr. 646; *Meredith v. Heneage*, 1 Sim. 542; *Greene v. Greene*, I. R. 3 Eq. 90, 629.

3. No trust will be implied from precatory words :

Precatory words may be explained so as not to raise a trust.

a. Where the donee may at his discretion apply the property to other purposes. *Lefroy v. Flood*, 4 Ir. Ch. 1 ; *Curtis v. Rippon*, 5 Mad. 434 ; *House v. House*, 23 W. R. 22 ; *Ex parte Payne*, 2 Y. & C. Ex. 636.

b. Or where there is an express direction that the donee's absolute interest is not to be curtailed. *Huskinson v. Bridge*, 15 Jur. 738 ; *Eaton v. Watts*, 1 Eq. 151.

c. Where the precatory words are stated not to be obligatory. *Young v. Martin*, 2 Y. & C. C. 582 ; *Shepherd v. Nottidge*, 2 J. & H. 766. *In re Bond* ; *Cole v. Hawes*, 4 Ch. D. 238.

d. Or where the donee is to take free and unfettered. *Meredith v. Heneage*, 1 Sim. 542 ; 10 Pr. 306 ; *Hoy v. Master*, 6 Sim. 568 ; *White v. Briggs*, 15 Sim. 33.

4. Where, however, there is sufficient certainty on the points already mentioned, a trust may be implied from any of the following expressions :

What words are sufficient to raise a precatory trust.

a. Words of confidence, such as "trusting:" *Baker v. Moseley*, 12 Jur. 740 ; *Irvine v. Sullivan*, 8 Eq. 673 ; "confiding:" *Griffiths v. Evan*, 5 B. 241 ; "not doubting:" *Parsons v. Baker*, 18 Ves. 476 ; "firm conviction:" *Barnes v. Grant*, 26 L. J. Ch. 92.

b. Words of request and entreaty, such as "entreat:" *Prevost v. Clarke*, 2 Mad. 458 ; "require and entreat:" *Taylor v. George*, 2 V. & B. 378 ; "wish and request:" *Foley v. Parry*, 5 Sim. 138 ; 2 M. & K. 138 ; "dying request:" *Pierson v. Garnet*, 2 B. C. C. 37, 226 ; "request:" *Eade v. Eade*, 5 Mad. 118 ; "beg:" *Corbet v. Corbet*, 1 R. 7 Eq. 456 ; "dying wish:" *Godfrey v. Godfrey*, 11 W. R. 554 ; "last will:" *Hinzman v. Poynder*, 5 Sim. 546 ; "wish and desire:" *Liddard v. Liddard*, 28 B. 266 ; see *Teasdale v. Braithwaite*, 5 Ch. D. 630 ; "desire:" *Harding v. Glyn*, 1 Atk. 469.

c. Even words of advice and recommendation, such as

"advise:" *Parker v. Bolton*, 5 L. J. Ch. 98; "recommend:" *Tibbets v. Tibbets*, 19 Ves. 656; Jac. 317; *Horwood v. West*, 1 S. & St. 387; *Ford v. Fowler*, 3 B. 146; *Malim v. Keighley*, 2 Ves. jun. 333, 529.

C. As to the interest taken by the donee in trust :

Distinction between a gift subject to trusts and a gift upon trusts.

1. If there is a gift *subject* to trusts, the donee takes whatever is not required for the performance of those trusts. *Dawson v. Clarke*, 15 Ves. 409; 18 Ves. 247; *King v. Denison*, 1 V. & B. 261; *Fenton v. Hawkins*, 9 W. R. 300; *Clarke v. Hilton*, L. R. 2 Eq. 810.

2. On the other hand, if the gift is *upon* trust, the donee takes the whole upon trust for the purposes declared; or for the heir at law or next of kin, if those purposes fail, or are not exhaustive or not declared. *Hobart v. Countess of Suffolk*, 2 Vern. 644; *Countess of Bristol v. Hungerford*, *ib.* 645; *Kellett v. Kellett*, 1 Ba. & Be. 533; 3 Dow. 248; *Watson v. Hayes*, 5 M. & Cr. 125; *Mullen v. Bowman*, 1 Coll. 197; *Andrews v. Andrews*, 1 Coll. 186; *Love v. Gaze*, 8 B. 472.

Gift upon condition may raise a trust.

It may be noticed, that a devise of property, upon condition of making certain payments out of it, which are shown on the face of the instrument, to exhaust the whole, is in effect a gift of the whole upon trust, and not subject to trusts. *A.-G. v. Wax Chandlers*, L. R. 6 H. L. 1; *A.-G. v. Merchant Taylors*, 6 Ch. 512; and see *Bird v. Harris*, 9 Eq. 204.

In what cases the donee takes the whole on trust.

3. Again, where the gift is to the donee indefinitely, without words expressly giving a beneficial interest, followed by precatory words, which raise a trust in favour of a particular class, the donee takes the whole in trust; as where the gift was to the testator's wife, under the firm conviction that she would dispose of and manage the same for the benefit of her children. *Barnes v. Grant*, 2 Jur. N. S. 1127; 26 L. J. Ch. 92; *Talbot v. O'Sullivan*, 6 L. R. Ir. 302; see *In re Rae's Estate*, 1 L. R. Ir. 174.

So a gift, without words of benefit superadded, for some particular purpose, whether declared or not, raises a trust as to the whole. *Corporation of Gloucester v. Wood*, 3 Ha. 131; 1 H. L. 272; *Aston v. Wood*, 6 Eq. 419.

Where the gift is in trust, the fact that the donee is described as wife or relation of the testator, or that a legacy is given to the heir, will not entitle such donee to any beneficial interest. *Wych v. Packington*, 3 B. P. C. 44; *Wills v. Wills*, 1 Dr. & War. 439; *Starkey v. Brooks*, 1 P. W. 390.

Where a precatory trust is created in favour of a class, the donee may limit the shares of female members of the class to their separate use. *Willis v. Keymer*, 7 Ch. D. 181.

4. If words of benefit are superadded, if, for instance, the gift is to A. for his own use and benefit, or absolutely, followed by words which raise a trust, the donee takes beneficially, subject to those trusts. *Wood v. Cox*, 5 M. & Cr. 684; *Shelley v. Shelley*, 6 Eq. 540; *Irvine v. Sullivan*, 8 Eq. 673. Cases where the donee in trust is intended to take some interest.

But the case is different if such words as "for her sole use and benefit" can be shown to be inserted merely for the purpose of excluding a husband from the trust, as in *Stubbs v. Sargon*, 2 Kee, 255; 3 M. & Cr. 507, where the gift was to A. for her sole use and benefit, independent of her husband, for an express purpose.

5. So, though the gift may be upon trust, it may appear that the donee is intended to take some beneficial interest by the fact that the testator calls her his heiress, or expressly excludes his heir from any benefit. *Rogers v. Rogers*, 3 P. W. 193; *Hughes v. Evans*, 13 Sim. 496; see *Williams v. Roberts*, 27 L. J. Ch. 177; 4 Jur. N. S. 18.

6. Again, the trust may not arise till the death of the donee upon trust, in which case he will take beneficially during his life. Cases where the trust does not arise till the

death of  
the donee.

a. Where there are words of indefinite gift followed by a recommendation or entreaty that the donee will at his decease give the property to a certain class, this raises a trust subject to his life interest. *Pierson v. Garrett*, 2 B. C. C. 38, 226; *Malim v. Keighley*, 2 Ves. jun. 333, 529; *Cholmondeley v. Cholmondeley*, 14 Sim. 590; *Prevost v. Clarke*, 2 Mad. 458.

2. The same construction was adopted, where there was an intention that the donee was not to dispose of the capital in her lifetime, followed by a recommendation to give the property in a certain way. See *Horwood v. West*, 1 S. & St. 387.

b. So, too, where the gift is to A. *for his own sole use and benefit*, with an expression of desire or confidence that he will dispose of it among a certain class during his life and at his decease, the donee takes a life interest with a power of appointment by deed or will. *Harding v. Glyn*, 1 Atk. 469; *Evans v. Evans*, 12 W. R. 508; *Curnick v. Tucker*, 17 Eq. 320; *Fordham v. Speight*, 23 W. R. 782; *Le Marchant v. Le Marchant*, 18 Eq. 414; see, however, *In re Hutchinson & Tenant*, 8 Ch. D. 540.

c. And even where there was a gift to A. *to and for his sole use and benefit*, subsequent words, expressive of confidence that the donee would apply the same for her children *thereafter*, were held to give an interest for life with a power of appointment. *Gully v. Cregoe*, 24 B. 185.

And even in the absence of anything to show that the donee was intended to take a life interest, the same construction has been adopted. *Ware v. Mallard*, 21 L. J. Ch. 355; 16 Jur. 492; *Shovelton v. Shovelton*, 32 B. 143.

Cases  
where  
the donee  
in trust is  
herself one  
of the  
objects of  
the trust.

d. Where a power is given to a person to dispose of property for herself and her children, she does not take an absolute interest. *Crockett v. Crockett*, 2 Ph. 553.

Nor will the legatee take absolutely where property is given to a legatee on trust for herself and her children:



*Costabadie v. Costabadie*, 6 Ha. 410; *Godfrey v. Godfrey*, 11 W. R. 554; or to be applied for herself and her children: *Bibby v. Thompson*, 32 B. 646; or to be used for the benefit of herself and her children, at the discretion of the donee: *Hart v. Tribe*, 32 B. 279; 1 D. J. & S. 418; *Godfrey v. Godfrey*, 11 W. R. 554; *Newill v. Newill*, 7 Ch. 253; *Armstrong v. Armstrong*, 7 Eq. 518; see *Scott v. Key*, 13 W. R. 1030.

And even a life interest given to the testator's wife for the benefit of herself and her children is divisible equally among them. *Jubber v. Jubber*, 9 Sim. 503; see *Taylor v. Bacon*, 8 Sim. 100.

If, however, the gift is to A. with large powers of disposition or words of benefit added, the fact, that the gift is expressed to be for the benefit of herself and her children, will not raise a trust. *Lambe v. Eames*, 10 Eq. 267; 6 Ch. 597; *M'Alinden v. M'Alinden*, 1. R. 11 Eq. 219; *In re Hutchinson & Tenant*, 8 Ch. D. 540. See *Webb v. Woolls*, 2 Sim. N. S. 267.

And where there is an absolute gift to A., a subsequent declaration that the benefit of A. and her children was the motive of the gift will raise no trust. *Thorp v. Owen*, 2 Ha. 607. See *Mackett v. Mackett*, 14 Eq. 49; *Briggs v. Sharp*, 20 Eq. 317.

Similarly a gift to enable a person to do something creates no trust. *Benson v. Whittam*, 5 Sim. 22; *Ryan v. Keogh*, 1. R. 4 Eq. 357. See *Biddles v. Biddles*, 16 Sim. 1; *quære*, whether *Byne v. Blackburn*, 26 B. 41, can stand on this ground.

Where the interest upon legacies given to children is directed to be paid to their parents, and applied by them for their maintenance, the parents take subject to no account. *Hammond v. Neame*, 1 Sw. 35; *Berkeley v. Swinburne*, 6 Sim. 613; *Hadow v. Hadow*, 9 Sim. 438; *Browne v. Paull*, 1 Sim. N. S. 92.

Distinction between trust and motive.

Gifts to the parent to be applied for the maintenance of his children,

In the same way a gift to the parent for the benefit or maintenance of himself and his children may be safely paid to the parent. *Cooper v. Thornton*, 3 B. C. C. 96, 186; *Robinson v. Tickell*, 8 Ves. 142; *Re Robertson's Trust*, 6 W. R. 405.

## VI. LEGACIES GIVEN TO BENEFIT A LEGATEE IN A PARTICULAR WAY.

Legacy to a legatee to be applied in a particular way for the benefit of the legatee.

1. A legacy given to a person for a particular purpose for the benefit of the legatee, is good though the purpose fails or becomes incapable of execution. *Barton v. Grant*, 1 Vern. 255; *Nevill v. Nevill*, 2 Vern. 431; *Barton v. Cooke*, 5 Ves. 462; *Parsons v. Ooke*, 6 W. R. 715; *Noel v. Jones*, 16 Sim. 309; *Lockhart v. Hardy*, 9 B. 379; *Leche v. Lord Kilmorey*, T. & R. 207; *Palmer v. Fowler*, 13 Eq. 250.

The legacy will not be cut down to the amount actually required for the named purpose, unless the surplus, after satisfying that purpose, is expressly given over. *In re Lee's Trusts*, 1 R. 10 Eq. 157.

If a discretion is given to trustees to apply the interest and principal of a fund for the benefit of a legatee, with a gift over of so much as is not applied, and the trustees refuse to exercise their discretion, the whole fund belongs to the legatee. *Gude v. Worthington*, 3 De G. & Sm. 389; *Gough v. Bult*, 16 Sim. 45.

Discretion to trustees to apply money in a certain way for a legatee.

2. On the other hand, where a discretion is given to trustees to apply money to a particular purpose, the Court will inquire whether the occasion for the gift arises. *Lewis v. Lewis*, 1 Cox, 162; *Robinson v. Cleaton*, 15 Ves. 526; *Cowper v. Mantell*, 22 B. 231; *Sanderson's Trust*, 3 K. & J. 497; *Re Ward's Trust*, 7 Ch. 727.

Distinction where the purpose is not merely the benefit of the legatee.

3. If the purpose for which the money is given is not merely the benefit of the legatee, but also the gratification of some wish of the testator, the question is, which is the primary object. *Re Skinner's Trust*, 1 J. & H. 102.

## CHAPTER XXXII.

## GIFTS OF ANNUITIES.

## I. CHARACTERISTICS OF ANNUITIES.

AN annuity charged upon lands devised in fee is a legal Annuity rent-charge, even though it may be given to a person, his <sup>and rent-charge dis-</sup> executors and administrators. *Ramsay v. Thorngate*, <sup>tinguished.</sup> 16 Sim. 575.

And a right to distrain is attached to it by statute 4 Geo. II. c. 28, s. 5. *Buttery v. Robinson*, 3 Bing. 392; *Sollory v. Leaver*, 9 Eq. 22; *Kelsey v. Kelsey*, 17 Eq. 496.

In *Sollory v. Leaver* it was held, that an annuitant <sup>Right to</sup> whose annuity had fallen into arrear, was not entitled to a <sup>receiver.</sup> receiver, on the ground that he had a sufficient remedy by distress. A receiver would, however, probably now be appointed in such a case under section 25, sub-section 8, of the Judicature Act, 1873.

An annuitant whose annuity is charged upon freeholds <sup>Right to</sup> and residue is entitled to have the estate administered in <sup>adminis-</sup> order to ascertain the residue. *Wollaston v. Wollaston*, <sup>ter.</sup> 7 Ch. D. 58.

A rent-charge, though charged upon realty and personalty, will be looked upon as issuing out of the realty alone. *Butt's Case*, 4 Rep. 98, Pt. 7, 23 a; Co. Litt. 147 a; *Richardson v. Nixon*, 7 Ir. Eq. 620; *Sollory v. Leaver*, 9 Eq. 22.

The rule in *Shelley's Case* and the other technical <sup>The rule</sup>

in Shelley's case applies to rent-charges.

rules of construction apply to the limitations of a rent-charge. *Drew v. Barry*, 1 R. 7 Eq. 413; 8 *ib.* 260.

A rent-charge is entailable, but if an estate tail is created in a rent-charge, and no remainder in fee is limited, the tenant in tail cannot create more than a base fee. Co. Litt. 298 *a*, note 2; *Chaplin v. Chaplin*, 3 P. Wms. 229.

Annuity to A. and his heirs.

An annuity, given out of personal assets, if given with words of inheritance, will devolve like real estate.

Annuities are not within the Statute de donis.

Such an annuity, however, not being within the *Statute de donis*, cannot be entailed. A devise, therefore, of a personal annuity to A. and the heirs of his body, gives A. a fee simple conditional. *Earl of Stafford v. Buckley*, 2 Ves. sen. 170; *Turner v. Turner*, Amb. 776; 1 B. C. C. 316.

Annuity given to a man and his heirs remains personal except for purposes of devolution.

But an annuity, though given with words of inheritance, is, for all other purposes except descent, personal. *Earl of Stafford v. Buckley*, 2 Ves. sen. 171; *Lady Holderness v. Lord Carmarthen*, 1 B. C. C. 377; *Aubin v. Daly*, 4 B. & Ald. 59; *Radburn v. Jervis*, 3 B. 450.

And an annuity charged upon real and personal estate, but given without words of limitation appropriate to realty, is personal estate. *Taylor v. Martindale*, 12 Sim. 158; *Parsons v. Parsons*, 8 Eq. 260.

Direction to lay out sum in purchase of annuity.

A direction to lay out a specified sum in the purchase of an annuity for the life of A. vests that sum in the annuitant, whether the annuity is in possession or reversion. *Yates v. Compton*, 2 P. Wms. 308; *Barnes v. Rowley*, 3 Ves. 305; *Bayley v. Bishop*, 9 Ves. 6; *Palmer v. Craufurd*, 3 Sw. 482; see *Smith v. King*, 1 Russ. 363.

Direction to purchase annuity of certain amount.

So if there is a direction to purchase a Government annuity of a given amount, the annuitant is entitled to the purchase-money, though he may die before the time when the annuity was to be purchased. *Dawson v. Hearn*, 1 R. & M. 606; *Ford v. Batley*, 17 B. 303.

Upon the same principle a discretionary trust to purchase an annuity out of a fund, authorises advances to the

legatee from time to time out of the capital of the fund.

*Messeena v. Carr*, 9 Eq. 260.

A direction that the annuitant shall not be allowed to accept the value of the annuity in lieu thereof has been held ineffectual. *Stokes v. Cheek*, 28 B. 620.

Annuitant not to have value of his annuity.

A discretion vested in trustees to apply the annuity for the benefit of the annuitant in the event of her incapacity will not alter the rule. *Re Browne's Will*, 27 B. 324.

Discretionary trust.

And a restraint upon anticipation will not deprive the annuitant of the right to the purchase-money, except in the case of a married woman. *Woodmeston v. Walker*, 2 R. & M. 197.

Restraint upon anticipation.

Where a fund was bequeathed to purchase an annuity in the name of an annuitant, a declaration that the annuity should cease upon alienation was held not to take the case out of the rule. *Hunt Foulston v. Furber*, 3 Ch. D. 285.

Cesser upon alienation.

Where a fund is directed to be laid out by trustees in the purchase of an annuity for the life of A., for his support and maintenance, with a gift over if he alienates it or becomes bankrupt, the cases are directly conflicting upon the question, whether the representatives of the annuitant are entitled to have the fund paid over, if the annuitant dies before the time when the annuity was to be purchased, without having alienated the annuity or become bankrupt.

Gift over upon bankruptcy or alienation.

In *Day v. Day*, 1 Dr. 569, the fund was directed to be paid to the representatives of the annuitant, but this decision was not followed in *Power v. Hayne*, 8 Eq. 262; see *Hatton v. May*, 3 Ch. D. 148.

Though the gift over upon bankruptcy or alienation might prevent the annuitant himself from calling for a transfer of the fund, it would seem that his representatives ought to be entitled to the fund if the gift over does not take effect. See *Pearson v. Dolman*, 3 Eq. 315.

**Annuitant is not entitled to the value of his annuity.** In the case of a gift of an annuity with a direction to set apart a fund to secure it, it is clear that the annuitant is not entitled to have the annuity valued and the value paid to him. *Wright v. Callender*, 2 D. M. & G. 652; *Miner v. Baldwin*, 1 Sm. & G. 522.

**Deficient estate under administration.** If, however, the testator's estate is being administered by the Court and proves insufficient to pay the legacies and annuities given, so that an abatement is necessary, a value will be put upon the annuities as from the testator's death, and the annuitant or his representatives will be entitled to the valued amount after abatement. *Wroughton v. Colquhoun*, 1 De G. & S. 357; *Carr v. Ingleby*, *ib.* 362; *Long v. Hughes*, *ib.* 364.

This principle applies only where the estate is being administered. *In re Nicholson's Estate*, 1 R. 11 Eq. 177.

It does not apply to annuities determinable on marriage or bankruptcy. *Carr v. Ingleby*, *supra*; *Gratrix v. Chambers*, 2 Giff. 321.

## II. THE DURATION OF GIFTS OF ANNUITIES AND ANNUAL SUMS.

**Annuity whether for life or perpetual.** 1. When an annuity is given to a person without more, the question arises, whether it was meant to be for life only, or perpetual; and this point, in the case of annuities created *de novo*, is unaffected by sect. 28 of the Wills Act. *Nicholls v. Hawkes*, 10 Ha. 342.

In the case of a deed, it has been decided, that a grant of an annuity given without words of limitation and charged upon freeholds, gives a life interest. The same rule applies if the annuity is charged on freeholds and chattels real. *Butt's Case*, 7 Rep. 23 a; *In re Gillman's Estate*, 1 R. 10 Eq. 92.

Whether a grant of an annuity without words of limitation charged upon a chattel interest would endure beyond

the life of the annuitant, if he dies during the term, is doubtful. Cases *supra*.

In the case of wills the presumption is, that an annuity *Prima facie* a gift given simply is for life only, whether it is given to a single legatee, or to A. for life, and then to B. simply, or to A. with power to give it after his death to another, or to several others and the survivor. *Blewitt v. Roberts*, 10 Sim. 491; Cr. & Ph. 274; *Yates v. Maden*, 3 Mac. & G. 532. of an annuity is for life only.

An annuity given for education and maintenance cannot endure beyond the life of the annuitants. *Wilkins v. Jodrell*, 13 Ch. D. 564; see p. 396, *post*.

But an intention may be gathered from the will, that the annuity is to be perpetual, and no particular words of limitation are necessary for this purpose. Thus :

a. An annuity is perpetual, if there is a gift of property to produce it. *Stokes v. Heron*, 12 Cl. & F. 161; *Hicks v. Ross*, 14 Eq. 141. Gift of property to produce annuity.

b. It is said that a direction to purchase an annuity of a given amount is equivalent to a direction to purchase a perpetual annuity, and the case of *Ross v. Borer*, 2 J. & H. 469, decided on the authority of *Kerr v. Middlesex Hospital*, 2 D. M. & G. 576, seems to go the full length of this proposition. On principle, however, it is difficult to see in what respect a direction to purchase an annuity can be distinguished from a mere gift of an annuity. Direction to purchase annuity.

Of course, if there is a dedication of a part or the whole of the testator's property to produce an annuity, this may in effect be a gift of so much property as will produce the annual amount, as in *Stokes v. Heron*, 12 Cl. & F. 161, where there were other circumstances which tended to show that the annuities were to be perpetual. See *Wakeham v. Merrick*, 37 L. J. Ch. 45. Dedication of property.

Or, again, the testator may distribute the whole of his estate in the form of gifts of annual sums or annuities to

different legatees, as in *Kerr v. Middlesex Hospital*, 2 D. M. & G. 576, where the fact that one of the gifts of a certain annual income was to the Middlesex Hospital was strong evidence to show that other annuities given in very similar language were intended to be perpetual. See, too, *Hicks v. Ross*, 14 Eq. 141.

But it may be doubted whether the proposition, that a direction to purchase an annuity gives a perpetual annuity, laid down in *Kerr v. Middlesex Hospital*, and *Ross v. Borer*, will be acquiesced in.

At any rate a direction to invest a sum in Government securities sufficient to produce a certain annual sum which is given to an annuitant, gives only a life interest. *Re Grove's Trusts*, 1 Giff. 74; see *Banks v. Braithwaite*, 11 W. R. 398; 32 L. J. Ch. 35, 198.

Gift of  
part of  
annual in-  
come of a  
fund.

c. If the annuity is given as part of the income of a particular fund, it amounts to a gift of so much of the fund itself. *Bignold v. Giles*, 4 Dr. 343; *Courtenay v. Gallagher*, 5 Ir. Ch. 154, 356; *Rawlings v. Jennings*, 13 Ves. 39; *Potter v. Baker*, 13 B. 273; 15 B. 489; *Bent v. Cullen*, 6 Ch. 235; see *Evans v. Walker*, 3 Ch. D. 211.

Possibly a gift of so much a year would be considered a gift of the capital producing the annual sum. See *Hill v. Rattey*, 2 J. & H. 634.

Where a testator bequeathed to his daughter on her marriage a sum of stock producing a certain annual sum, and gave her out of his general dividends an annual sum to make up the income to £400, the latter gift was held to be a gift of capital producing the necessary income. *Engelhardt v. Engelhardt*, 26 W. R. 853.

Gift of  
testator's  
property  
to pay an  
annuity  
will not

d. But a mere devise of all the testator's property on trust to pay an annuity, or a charge on a certain fund, will not make the annuity perpetual. *Lett v. Randall*, 3 Sm. & G. 83; 2 D. F. & J. 388; *Sullivan v. Galbraith*, 1. R.



4 Eq. 582; *Wilson v. Maddison*, 2 Y. & C. C. 372. See make it perpetual.  
*Innes v. Mitchell*, 6 Ves. 464; 9 Ves. 212.

e. If the annuity is directed to cease if the legatee dies Direction for cesser or sale at a certain time. without issue, or is directed not to be sold till after the death of the legatee, there is a strong argument that it was meant to be perpetual. *Hedges v. Harpur*, 3 De G. & J. 129; *Pawson v. Pawson*, 19 B. 146.

f. Or again, if the legatee has a power of appointing the annuity in words that would authorise the appointment of Powers of appointing the annuity in fee. a perpetual annuity, or the annuity is given over in certain events in fee, the same argument arises. *Wright v. Wright*, 12 Ir. Ch. 401; *Robinson v. Hunt*, 4 B. 450.

g. And, if the annuity, being given to several persons Limitations inconsistent with a mere life interest. as tenants in common, is given over in its entirety at a period when, if it were only for the life of the legatees it might have partially determined, it will be perpetual, as it would be absurd to suppose that it is to cease upon the death of a prior annuitant and to revive again in certain events. *Mansergh v. Campbell*, 3 De G. & J. 237; *Barden v. Meagher*, I. R. 1 Eq. 246.

h. In *Parsons v. Parsons*, 8 Eq. 260, an annuity, given Gift of annuities to several or their heirs. to several or their heirs, was held to be perpetual, though the heirs took by substitution.

## 2. Implication of survivorship between annuitants:

A bequest of an annuity to two persons for their lives Gift of an annuity to two persons for their lives. goes to the survivor for his life, though the annuitants may be husband and wife. *Moffat v. Burnie*, 18 B. 211; *Neighbour v. Thurlow*, 28 B. 33; *Alder v. Lawless*, 32 B. 72. See *Day v. Day*, Kay, 703.

As to the construction of a bequest of an annuity to two Gift to two as tenants in common for their lives. persons as tenants in common for their lives without more, see *Lill v. Lill*, 23 B. 446; *Grant v. Winbolt*, 2 W. R. 151; 23 L. J. Ch. 282.

Where the gift is to two persons as tenants in common for their lives, with a gift over after their death:

Gift over after the death of the survivor.

a. If the gift over is expressly after the death of the survivor, benefit of survivorship will be implied between the annuitants. *Armstrong v. Eldridge*, 3 B. C. C. 215.

Gift over after the death of all the tenants for life.

b. So, if the gift over is not till after the death of both, or the whole is given after their death as one undivided fund, the survivor will take the whole. *Tucker-man v. Jeffries*, 3 Bac. Abr. ed. Gw. 681; 11 Mod. 108; *M'Dermott v. Wallace*, 5 B. 142; *Draycott v. Wood*, 8 L. T. N. S. 304.

The same rule applies though the gift is expressly to A. and B. for their *joint* lives, if nothing is given over till after the decease of both. *Townley v. Bolton*, 1 M. & K. 148.

Gift over after the death of the annuitants and a third person.

c. This implication of survivorship, however, does not arise, where the gift over is not merely after the death of the annuitants, but after the death of the annuitants and some other person who cannot have been intended to take by survivorship. *Re Drakeley's Estate*, 19 B. 395.

Nor can it arise, where the shares of legatees dying are expressly disposed of during the period between the death of each and the death of all. *Walmsley v. Foxall*, 1 D. J. & S. 605.

Meaning of "every."

As to the meaning of "every" in a gift over after the death of every of the annuitants, see *Brown v. Jarvis*, 2 D. F. & J. 168.

Cases where the gift over is to the children of the tenants for life.

d. If the gift over is to the children of the annuitants, the most obvious construction is, that the share of each goes over immediately on his death to his children. *Sutcliffe v. Howard*, 38 L. J. Ch. 472. See pp. 254, 255, *ante*.

But if it is clear that nothing is given to the children till after the death of all the tenants for life, the survivor takes the whole. *Begley v. Cooke*, 3 Dr. 662; *Alt v. Gregory*, 8 D. M. & G. 221. See *Minton v. Minton*, 9 W. R. 586.

In such cases the fact that the distribution is to be *per capita*, and not *per stirpes*, would be an argument, that the distribution was to be postponed till the death of the surviving tenant for life. See *Pearce v. Edmeades*, 3 Y. & C. Ex. 246; 2 W. R. 672.

Arguments in favour of postponing distribution till the death of the surviving tenant for life.

It seems also that if the gift after the death of the annuitants is to their heirs *per capita*, this would afford a strong argument for implying a life interest in the surviving annuitants; but the case is different if the gift over is to the heirs of the annuitants and of other persons. *Hensley v. Wills*, 14 W. R. 423.

e. Where, however, the duration of the annuity is clearly defined by the original gift, as for instance, where the gift is to several as tenants in common for their lives and the life of the survivor, the shares of those dying during the duration of the annuity pass to their representatives. *Jones v. Randall*, 1 J. & W. 100; *Eales v. Cardigan*, 9 Sim. 384; *Bryan v. Twigg*, L. R. 3 Eq. 433; 3 Ch. 183; *Chatfield v. Berchtoldt*, 18 W. R. 887; see *Round v. Peckett*, 47 L. J. Ch. 631; *Kelsey v. Ellis*, 38 L. T. N. S. 471.

There can be no implication of survivorship where the duration of the annuity is clearly defined by the original gift.

It is submitted, that in such a case a gift over after the death of the survivor of the annuitants can have no influence on the construction; see, however, the decree of Sir W. Grant in *Avern v. Lloyd*, 5 Eq. 383.

There may, however, in such a case, be words to show that the survivor was to take the whole. Thus, if the gift is to several as tenants in common "for their lives, or the life of the survivor, for *their or her* absolute use," or "for their lives and the life of the survivor during *their and her* natural life," the additional words show that the survivor was meant to take the whole. *Hatton v. Finch*, 4 B. 186; *Cranswick v. Pearson*, 31 B. 624; affd. 9 L. T. N. S. 275; and in *Doe d. Borwell v. Abey*, 1 Mau. & S. 428, the gift over "from and after their *respective* deceases and the

Words amounting to an express gift to the survivor.

decease of the survivor," indicated that the representatives of annuitants were not to take anything after their respective deaths.

3. Distinction between annuities given for a period and for an object :

Annuity given for fixed period for maintenance does not determine with minority.

An annuity given to a person for a fixed period for maintenance is not determined by the attainment of majority, or by death before that period. *Badham v. Mee*, 1 R. & M. 631 ; *Longmore v. Elcum*, 2 Y. & C. C. 363 ; *Lewes v. Lewes*, 16 Sim. 266 ; *Atwood v. Alford*, L. R. 2 Eq. 479 ; *In re Ord* ; *Dickinson v. Ord*, 9 Ch. D. 667 ; 12 Ch. D. 22.

This, however, does not apply where the duration of the annuity is merely the duration of the legal estate: if, for instance, the annuity is given to trustees for their lives, and the life of the longest liver of them, for the support of A. *Ryan v. Keogh*, I. R. 4 Eq. 357.

Annuity for maintenance and education.

The gift of an annual sum for maintenance and education is not to be limited to minority, but creates a life interest. *Soames v. Martin*, 10 Sim. 287 ; *Wilkins v. Jodrell*, 13 Ch. D. 564 ; see *Frewen v. Hamilton*, 47 L. J. Ch. 391 ; see p. 391, *ante*.

In *Gardner v. Barber*, 18 Jur. 508, an annuity for maintenance and education was limited to minority. See *Foley v. Parry*, 2 M. & K. 138.

Annuity to trustee for his trouble.

A gift of an annuity to a trustee, so long as he should continue to execute the office of trustee under the will, or for his trouble, ceases with the active trusts, not necessarily with a judgment for administration. *Baker v. Martin*, 8 Sim. 25 ; *Hull v. Christian*, 17 Eq. 546 ; *M'Dermot v. O'Connor*, I. R. 10 Eq. 352 ; *Clay v. Coles*, W. N. 1880, 145 ; *Henrion v. Bonham*, Dru. t. Sug. 476.

Gift to a person during the minority of an infant.

It is clear that a gift of rents and profits to a parent during the minority of a child, where no benefit is intended for the child, will go to the representatives of the parent

if he dies during the minority. *Smith v. Havers*, Cro. Eliz. 252; *Laaxton v. Eedle*, 19 B. 321.

On the other hand, if the child dies during his minority, the parent will, nevertheless, be entitled to the rents and profits till the time when the child, if living, would have attained twenty-one, if the object of the gift is payment of debts. *Carter v. Church*, 1 Ch. Ca. 113; *Boraston's Case*, 3 Co. 19 a.

And it would seem that the construction would be the same if the object of the term is the benefit of the person to whom the rents and profits are given during the minority. *Coates v. Needham*, 2 Vern. 65. See 1 Jarm. 546.

On the other hand, if the term is created for the benefit of the child, or if the object of it is merely to postpone the interest of the child till he should have performed some condition, which could not be performed after his death, the term will determine with his life. See *Manfield v. Dugard*, 1 Eq. Ca. Abr. 194, pl. 4, where the report is very unsatisfactory. *Lomax v. Holmedon*, 3 P. W. 176; and see *Castle v. Eate*, 7 B. 296; *Goodright d. Revell v. Parker*, 1 M. & S. 692.

## CHAPTER XXXIII.

## CONDITIONS PRECEDENT—VESTING.

## CONDITIONS DISTINGUISHED.

1. THE Court is never astute to construe a testator's words as importing a condition if a different meaning can be fairly given to them.

Condition  
and trust.

Thus, a devise "upon condition" that the devisee makes certain payments within a given time will, as a rule, be construed as a trust, and not as a condition. *Young v. Grove*, 4 C. B. 668; *Wright v. Wilkin*, 9 W. R. 161; 10 W. R. 403; see *A.-G. v. Wax Chandlers*, L. R. 6 H. L. 1; *A.-G. v. Merchant Taylors*, 6 Ch. 512; and see *Bird v. Harris*, 9 Eq. 204; *Foot v. Cunningham*, 11 Eq. 306.

Condition  
and limita-  
tion.

2. In some cases a condition apparently precedent has been read as forming part of the original limitation. Thus, a devise to M. and the heirs of her body, on condition that she marry and have issue male by S., was held to give an estate in special tail to M. *Page v. Hayward*, 2 Salk. 570.

Similarly, an estate to arise upon a condition, which cuts down a previous estate will, if possible, be construed as a remainder by looking upon the condition as forming part of the limitation of the previous estate. Thus, a devise to A. for life if she should not marry again, but if she did, to B., will be construed as a devise to A. for life or till marriage. *Luxford v. Cheek*, 3 Lev. 125; *Lady*

*Ann Fry's Case*, 1 Ventr. 203 ; *Gordon v. Adolphus*, 3 B. P. C. 306.

So, too, if the gift for life is made "subject to the proviso hereinafter contained," the proviso is incorporated into the original limitation. *Webb v. Grace*, 2 Ph. 701. Devise for life subject to a proviso.

And a bequest to A. for life, if she should so long remain unmarried, will be construed in the same way. *Heath v. Lewis*, 3 D. M. & G. 954.

On the other hand, if the condition is so penned that it cannot be connected with the previous limitation for life, it must take effect as a condition. *Sheffield v. Lord Orrery*, 3 Atk. 282 ; see *Allen v. Jackson*, 1 Ch. D. 399.

In such a case, however, it may appear that the original estate was only meant to last till the condition takes effect, if, for instance, the rents are directed to be paid to a woman, which could only be done till her marriage, the estate not being given to her separate use. *Meeds v. Wood*, 19 B. 215.

Upon the same principle, the ordinary limitation to trustees to preserve contingent remainders is a vested remainder, the prior estate being looked upon as lasting till forfeiture by the prior taker. *Smith d. Dormer v. Parkhurst*, 18 Viner, fol. 413 ; 3 Atk. 135 ; 4 B. P. C. 353. Estate of trustees to preserve.

#### CHARACTERISTICS OF CONDITIONS PRECEDENT.

Whether a condition is subsequent or precedent must depend on the language in which it is framed, and very little help can be derived from decided cases on the point. It may, however, be noticed, that when the condition requires something to be done, which will take time, the argument is in favour of construing it as a condition subsequent. *Popham v. Bampffield*, 1 Vern. 79 ; 1 Eq. Ab. 108, pl. 2 ; *Peyton v. Bury*, 2 P. W. 626 ; *Duddy v. Gresham*, 2 L. R. Ir. 443. General test of condition precedent.

On the other hand, a condition, which involves anything in the nature of consideration, is in general a condition precedent. *Acherley v. Vernon*, Willes, 153; *In re Wellstead*, 25 B. 612.

Condition precedent whether impossible, impolitic, or illegal, must be fulfilled in the case of realty.

If a devise be made to take effect only on performance of some particular duty by the devisee, or upon some particular event, there is no gift unless the condition is fulfilled. And it makes no difference that the event is impossible, impolitic, or illegal. See *Egerton v. Earl of Brownlow*, 4 H. L. 1; *Priestley v. Holgate*, 3 K. & J. 286; see *Caldwell v. Cresswell*, 6 Ch. 278.

In personalty condition precedent involving a physical impossibility is invalid.

But as regards personalty, a gift made upon a condition precedent involving a physical impossibility, such as to drink up the ocean, takes effect notwithstanding the condition. See 1 Swin., Part IV., sec. 6, p. 257; Co. Lit. 206 b.

But if the condition precedent, though in fact impossible at the date of the will, or becoming impossible by subsequent events, involves no physical impossibility, the gift will not take effect. *Lowther v. Cavendish*, 1 Ed. 99, 116; *Robinson v. Wheelwright*, 21 B. 214; 6 D. M. & G. 535.

Condition discharged by testator.

As regards realty and personalty, a condition precedent which becomes impossible by the act of the testator is discharged. Co. Lit. 206 b., sec. 334; *Gath v. Barton*, 1 B. 478; *Darley v. Langworthy*, 3 B. P. C. 359.

Condition contra bonos mores.

In personalty a condition precedent which is *contra bonos mores* may be rejected, leaving the gift absolute. *Brown v. Peck*, 1 Ed. 140; *Wren v. Bradley*, 2 De G. & Sm. 49.

#### VESTING OF REAL ESTATE.

General leaning in favour of vesting.

The Courts lean strongly in favour of early vesting. "Whilst estates remain contingent, those in whom they are at a future time to be vested have no interest in the estates or the rents and profits of such estates. Such estates must descend to the heir, if they are not given to



any person to hold until the events happen on which they are to become vested. Testators who create contingent estates often forget to make any provision for the preservation of their estates, and for the disposition of the rents and profits in the intermediate period between their deaths and the vesting of their estates. In such cases the estates descend to the heirs, who, knowing that they are to enjoy them only for a short period, and that they have obtained the possession of them from the inattention, and not from the bounty of, the testator, or from the mistake of the professional man who drew the will, will make the most that they can of them during the time that they remain theirs, regardless of any injury that the estates may suffer from their conduct. The rights of the different members of families not being ascertained while estates remain contingent, such families continue in an unsettled state, which is often productive of inconvenience and sometimes of injury to them. If the attaining a certain age be a condition precedent to the vesting estates, by the death of their parents before they are of that age, children lose estates which were intended for them, and which their relation to the testator may give them the strongest claim to." *Per* Best, C. J., *Duffield v. Duffield*, 3 Bl. N. S. 330; 1 Dow. N. S. 310.

A devise to A. and his heirs "if" or "when" he attains <sup>Devise</sup> twenty-one is contingent according to the opinion of <sup>"when"</sup> <sup>or "if" is</sup> <sup>contingent.</sup> *Fearne*, Post. Works, 191. So, too, "a devise in remainder to a class of children if they attain twenty-one is a contingent remainder. It is also a contingent remainder if it be a devise to a class of children equally at the age of twenty-one. And so also it is a contingent remainder if it be a devise in remainder to children who shall attain the age of twenty-one." *Per* Stuart, V.-C., in *Browne v. Browne*, 3 Sm. & G. 587; *Alexander v. Alexander*, 16 C. B. 59; see *Jull v. Jacobs*, 3 Ch. D. 703.

Condition requiring the attainment of a certain age may sometimes be subsequent.

Cases, however, where the condition as to attaining a certain age forms part of the original devise, must be distinguished from those cases, where the condition is contained in a separate direction; thus, where there has been an immediate devise followed by a clause directing that the devisee "is not to be of age to receive this" till he attains a certain age, or that it is to become his property on attaining twenty-five, the devisee has taken a vested interest subject to be divested. *Snow v. Poulden*, 1 Kee. 186; *Attwater v. Attwater*, 18 B. 330.

So, too, a devise to A., provided she lives to attain twenty-one, has been held vested subject to be divested. *Simmonds v. Cocks*, 29 B. 455, where the devise was after a life estate.

Express direction as to vesting.

Of course, when there is an express direction as to the period of vesting, nothing can vest before the appointed time; though on the other hand the question of vesting is not affected by a direction merely referring to the period of possession. *Russell v. Buchanan*, 2 Cr. & M. 561; 7 Sim. 628; *Montgomerie v. Woodley*, 5 Ves. 522; *Shrimpton v. Shrimpton*, 31 B. 425.

Cases in which a devise to A. at or when or if he attain 21 is vested.

A devise to A., at or when or if he attain twenty-one, will be vested:

Prior devise till A. attain 21.

1. If an estate is given prior to the attainment of twenty-one by the ultimate devisee to some third person either for the benefit of the devisee himself, or for the benefit of some other persons to endure during the minority. *Goodtitle d. Hayward v. Whitby*, 1 Burr. 228; *Re Mottram*, 10 Jur. N. S. 915; *Boraston's Case*, 3 Rep. 19 a.; *Manfield v. Dugard*, 1 Eq. Ab. 195, pl. 4.

In this case the estate given to the devisee on attaining twenty-one is in fact a vested interest subject to a term.

Prior devise for life.

2. A devise to A. for life, and *from and after* his decease to B., if he shall have attained twenty-one years, or so soon as he shall arrive at that age, was, in *Andrew*

v. *Andrew*, 1 Ch. D. 410, held to give B. a vested interest at birth, owing to the words "from and after," which were held to mean immediately after; but see *Alexander v. Alexander*, 16 C. B. 59.

Whether a devise in remainder after a life estate to B. if he attains twenty-one in the absence of the words "from and after" would give B. a vested interest subject to be divested seems doubtful, though the remarks in *Andrew v. Andrew*, *supra*, are in favour of such a construction; but see *Blagrove v. Hancock*, 16 Sim. 371; *Simmonds v. Cocks*, 29 B. 455.

3. However, if there is a gift over upon death under twenty-one, the gift over shows that the first devisee is to take whatever interest the person claiming under the devise over is not entitled to, that is to say, the immediate interest. *Bromfield v. Crowder*, 1 B. & P. N. R. 313; see 14 East, 604; *Doe d. Roake v. Newell*, 1 Mau. & S. 327; 5 Dow. 202; *Edwards v. Hammond*, 3 Lev. 132; *Doe d. Hunt v. Moore*, 14 East, 601; *Phipps v. Ackers*, 3 Cl. & Fin. 691; 9 *ib.* 583; *Whitter v. Bremridge*, L. R. 2 Eq. 736.

And the argument in favour of vesting is still stronger, if the gift over is upon death before the given time without issue. *Finch v. Lane*, 10 Eq. 501.

The attainment by the devisees of the given age is a certainty provided they live long enough; if, however, the contingency is some other event, as remainder to A. if he survives B., the estate is not vested till the event happens, notwithstanding the gift over. *Doe d. Planner v. Scudamore*, 2 B. & P. 289; *Price v. Hall*, 5 Eq. 399.

And of course the gift over can have no effect where there is an express direction as to the time of vesting. *Russell v. Buchanan*, 2 Cr. & Mee. 561; 7 Sim. 628.

4. There is, however, an important distinction between a devise to definite persons or to a class, which is clearly

Gift over  
upon death  
under 21.

Devise to a  
contingent  
class and to

a class upon  
a contin-  
gency.

and satisfactorily ascertained, at twenty-one, and a devise to such of a class as attain twenty-one, or to those who attain twenty-one. In the latter case "the finding or not finding the legatee depends on his attaining a particular qualification, and till the contingency happens, there is no one to whom the doctrine laid down in *Phipps v. Ackers* can apply." Such a devise, therefore, will not be vested by a gift over. *Duffield v. Duffield*, 3 Bl. N. S. 260; *Stephen v. Stephen*, Cases temp. Talb. 228; *Festing v. Allen*, 12 M. & W. 279; *Holmes v. Prescott*, 10 Jur. N. S. 507; 33 L. J. Ch. 264; 11 L. T. N. S. 38; 12 W. R. 636; 3 N. R. 559; *Rhodes v. Whitehead*, 2 Dr. & Sm. 532; 13 W. R. 800; *Price v. Hall*, 5 Eq. 399; *Eddel's Trust*, 11 Eq. 559; *Patching v. Barnett*, 28 W. R. 886. *Riley v. Gar-nett*, 3 De G. & S. 629, and *Browne v. Browne*, 3 Sm. & G. 568, will probably not be followed.

But a devise to A. for life, and if he leave a son born or to be born in due time after his decease, who should live to attain twenty-one, then to such son in fee if he attain twenty-one, with a gift over if A. die without leaving a son who should attain twenty-one, has been held to give an infant son of A. a vested estate subject to be divested, otherwise a child born within nine months of A.'s death could never take. *Muskett v. Eaton*, 1 Ch. D. 435; see, too, *Doe v. Hopkinson*, 5 Q. B. 223.

An estate  
to com-  
mence in  
certain  
events fails  
unless the  
events  
happen.

5. An estate limited to commence in certain specified events will fail altogether unless those exact events happen. Thus a gift, "if A. shall die, living my wife, without leaving a widow or any child, after his death and my wife's" to B., will fail if A. survives the testator's wife, though he may die without leaving a widow or child. *Holmes v. Cradock*, 3 Ves. 317; *Shuldham v. Smith*, 6 Dow. 22; *Dicken v. Clarke*, 2 Y. & C. Ex. 572.

So if a testator recites that he will be entitled to property in certain events, and disposes of it, if those events

happen, the property passes only if those events happen, though, in fact, he may be entitled to the property in other events as well. *Archbold v. Austin Gourlay*, 5 L. R. Ir. 214.

But in the case of successive limitations "where there is a limitation over which, though expressed in the form of a contingent limitation, is in fact dependent on a condition essential to the determination of the interests previously limited, notwithstanding the words in form import contingency, they mean no more in fact than that the person to take under the limitation over is to take subject to the interests previously limited." *Maddison v. Chapman*, 4 K. & J. 709, 719; 3 De G. & J. 536; *Webb v. Hearing*, Cro. Jac. 415; *Pearsall v. Simpson*, 15 Ves. 29; *Franks v. Price*, 3 B. 182; 5 Bing. N. C. 37; 6 Sc. 710; *Chellen v. Martin*, 21 W. R. 671; *Edgeworth v. Edgeworth*, L. R. 4 H. L. 35; see *post*, p. 477.

Where the contingency imports no more than the determination of prior interests the estate is vested.

Thus, if the devise is to A. for life remainder to B. for life, and on the decease of B, if A. be dead, to C. in fee, C. takes a vested remainder whether B. survives A. or not. *Cases supra*; see, too, *Key v. Key*, 4 D. M. & G. 73; *In re Betty Smith's Trusts*, L. R. 1 Eq. 79.

So a devise in remainder to a person for his life, if he shall be living when the prior limitations determine, is not contingent, nor will subsequent remainders be contingent upon the survivorship of the tenant for life. *Leadbeater v. Cross*, 2 Q. B. D. 18.

But to admit this construction, the limitation over must involve no incident, but what is essential to the determination of the estates previously limited. *Maddison v. Chapman*, 4 K. & J. 709; 3 De G. & J. 536.

Limits of the doctrine.

6. It is now settled, that when there is a gift to a person for life, if she so long remains unmarried, or for life until bankruptcy, followed by a gift over in the event of marriage or bankruptcy, the remainder is not contingent, but vested

Estates to arise upon the determination of a prior life estate by

marriage  
or bank-  
ruptcy  
take effect  
as vested  
remain-  
ders.

so as to take effect either upon the death or marriage or bankruptcy, as the case may be, of the tenant for life. *Luxford v Cheeke*, 3 Lev. 125; *Lady Ann Fry's Case*, 1 Vent. 199; *Gordon v. Adolphus*, 3 B. P. C. 306; *Foster v. Lord Romney*, 11 East, 594; *Meeds v. Wood*, 19 B. 215; *Browne v. Hammond*, Jo. 210; *Eaton v. Hewitt*, 2 Dr. & S. 184; *Wardroper v. Cutfield*, 12 W. R. 458; *Walpole v. Laslett*, 7 L. T. N. S. 526; 1 N. R. 180; *Etches v. Etches*, 3 Dr. 440.

*Pile v.  
Salter.*

In *Pile v. Salter*, 5 Sim. 411, it was held, that the fact of the gift over being in the event of marriage to the tenant for life, together with others, would prevent this construction. This case, however, was not followed in *Underhill v Roden*, 2 Ch. D. 494.

But this construction only applies where the ulterior limitation is a remainder, the event upon which it is to take effect being incorporated into the prior limitation for life, and not where the prior life estate is to be cut down in the event of the marriage of the tenant for life. *Sheffield v. Lord Orrery*, 3 Atk. 282.

If a sum is given to a legatee with a direction, that the interest shall be for her separate use for life and while she continues unmarried, with a gift over if she marries, the gift over only takes effect in that event. *McCulloch v. McCulloch*, 10 W. R. 515; 3 Giff. 606.

#### VESTING OF CHARGES ON LAND.

Legacies  
charged on  
land do not  
vest before  
they are  
payable.

The vesting of legacies charged upon real estate is governed by rules derived from the common law.

"If a sum of money be given to a person charged upon real estate, and that person, being an infant, is not to have the legacy immediately, but it is given at twenty-one or payable at twenty-one, if the child does not attain twenty-one the legacy is not raisable." *Parker v. Hodgson*, 1 Dr. & Sm. 568; see *Brown v. Wooler*, 2 Y. & C. C. 134.

But if the payment is postponed for purposes not referrible to the person of the legatee, but only for the convenience of the estate, as, for instance, in the case of a life tenancy, the legacies vest before the time of payment *Evans v. Scott*, 1 H. L. 57; *King v. Withers*, Ca. temp Talb. 116; see *In re Brabazon*, 13 Ir. Eq. 156.

Distinction between postponement of payment for the purposes of the estate and of the legatee.

It makes no difference, whether the legacies subject to a life interest are made payable at twenty-one or not, though it seems that they will not in any case vest before then. *Remnant v. Hood*, 2 D. F. & J. 396; *Davies v. Huguenin*, 1 H. & M. 730.

And a legacy charged upon land and directed to be paid upon an event which may or may not happen, for instance, when the testator's eldest son should come into possession of a settled estate, will fail if the event does not happen. *Taylor v. Lambert*, 2 Ch. D. 177.

Legacy payable upon an event which may never happen is contingent.

If a legacy is charged upon real and personal estate, the personal estate is the primary fund for payment, and so far as the personal estate extends, the vesting is governed by the rules applicable to personal estate, but so far as the legacy is payable out of realty the rules with regard to legacies charged upon land apply. *Duke of Chandos v. Talbot*, 2 P. W. 601, 612; *Prowse v. Abingdon*, 1 Atk. 481; *In re Hudsons*, Dru. t. Sugd. 6.

Legacy charged upon real and personal estate follows proportionally the rules applicable to realty and personalty.

#### VESTING OF BEQUESTS OF PERSONALTY.

The vesting of bequests of personalty, including chattels real, is governed by rules derived from the civil law. These rules apply also to realty directed to be converted. *In re Hudsons*, Dru. t. Sugd. 6; *Hart's Trusts*, 3 De G. & J. 195.

Vesting of personalty is governed by the civil law.

I. When there is an express direction as to the period of vesting:

It has been said that the word "vest," being derived from "vestire," naturally refers to vesting in possession, and

Meaning of "vest."

not to vesting in interest. *Young v. Robertson*, 4 Macq. 314. This is, however, contrary to the whole current of English authority, according to which the word "vest" has always been held to refer *prima facie* to vesting in interest or transmissibility, and not vesting in possession or indefeasibility.

Direction  
as to vest-  
ing is im-  
perative.

Thus, when there is a direction that the gifts are to be vested at a certain period, the legatees will take no interest till then.

Gift over  
upon death  
before the  
time of  
vesting will  
not alter  
the mean-  
ing of the  
word vest.

Where the interests of legatees are to be vested at twenty-one, a gift over upon death under twenty-one, or upon death before the time of vesting, will not affect the natural meaning of the word. *Glanvil v. Glanvil*, 2 Mer. 38; *Comport v. Austen*, 12 Sim. 218; *Griffith v. Blunt*, 4 B. 248; *Rowland v. Tawney*, 26 B. 67; *Re Thatcher's Trust*, ib. 365; *Selby v. Whitaker*, 6 Ch. D. 239.

When  
"vested"  
means  
"payable."  
Gift over  
upon death  
without  
issue before  
the time of  
vesting.

In many cases, however, "vested" has been used as equivalent to indefeasible or payable.

Thus, if the shares of members of a class are directed to be vested at a certain time, and there is a gift over to the other members of the class of the shares of those dying before that time without issue, vested will mean payable. *Taylor v. Frobisher*, 5 De G. & S. 191.

Shares  
treated as  
vested be-  
fore the  
time ap-  
pointed.

So, too, if legatees are treated as taking vested shares before the time fixed for vesting, vested must mean payable.

This will be the case, if a time is appointed for vesting, and maintenance is given, if any child entitled on the death of the tenant for life to a vested or presumptive share should be under the age appointed for vesting, where the word presumptive refers to the possibility of accruer. *Berkeley v. Swinburne*, 16 Sim. 275; *Baxter's Trust*, 4 N. R. 131; 10 Jur. N. S. 485.

Similarly, if in the event of any child dying before the time of vesting, leaving children, there is a gift of the share such child would have had if living to his issue, the



direction as to vesting will be referred to payment. *In re Edmondson's Estate*, 5 Eq. 389; *Poole v. Bott*, 11 Ha. 33.

Or again, it may appear that the testator has used the terms vested and paid interchangeably. *In re Edmondson's Estate, supra*; *Williams v. Haythorne*, 6 Ch. 782; *Re Parr's Trust*, 41 L. J. Ch. 170.

Vested and paid used interchangeably.

And when there is a direction to pay legacies at the death of the tenant for life, a subsequent direction as to vesting at twenty-one will be referred to indefeasible vesting or possession. *Barnet v. Barnet*, 29 B. 239; *Simpson v. Peach*, 16 Eq. 209.

Direction to pay legacies at a certain time.

When there is a gift to children who survive their parent, a direction as to vesting will not make the gift vest in any who do not survive their parent. *In re Payne*, 25 B. 556; *Williams v. Haythorne*, 6 Ch. 782; see *Draycott v. Wood*, 5 W. R. 158.

Gift to children who survive the parent with a direction as to vesting.

If, however, the proviso as to vesting is intended to introduce a new gift, evidenced by the fact, for instance, that it applies to prior legatees who die leaving issue, and not merely to such of them as survive the tenant for life, it will override the previous contingency of surviving the tenants for life. *Williams v. Russell*, 10 Jur. N. S. 168.

A direction that legatees are to be beneficially interested at a certain period, refers only to vesting in possession. *McLachlan v. Taitt*, 28 B. 407; 2 D. F. & J. 449.

Beneficial interest.

## II. Where there is no direction as to vesting :

1. It is important to distinguish a gift to a contingent class, and a gift to a class upon a contingency; thus, a gift to children who attain twenty-one, or to such children as attain twenty-one, is a gift to a contingent class, and will only vest in those who attain twenty-one, though there may be a gift of interest or other circumstances, which in a gift to a class upon a contingency, as for instance, at twenty-one, might have the effect of vesting the bequest. *Bull v. Pritchard*, 1 Russ. 213; *Bree v. Perfect*, 1 Coll.

Gift to a class who attain 21, and to a class at 21.

128; *Leake v. Robinson*, 2 Mer. 363; *Stead v. Platt*, 18 B. 50; *Lloyd v. Lloyd*, 3 K. & J. 20; *Thomas v. Wilberforce*, 31 B. 299; *Williams v. Haythorne*, 6 Ch. 782; *Dewar v. Brooke*, 14 Ch. D. 529; see *Re Bulley's Estate*, 11 Jur. N. S. 791, 847; *Gotch v. Foster*, 5 Eq. 311.

Contingency not imported into the gift to a single child.

If the gift is to children who attain twenty-one, and, if but one child, to such child, the contingency of attaining twenty-one will not be imported into the gift to a single child. *Walker v. Mower*, 16 B. 365; *Johnson v. Foulds*, 5 Eq. 268.

Direction as to payment will not postpone vesting when there is a clear gift.

2. When there is a clear gift, an additional direction to pay, when the legatee attains a given age, will not postpone the vesting, the gift being considered *debitum in presenti, solvendum in futuro*.

Thus, a gift to A, payable at twenty-one, is vested, and it makes no difference whether the gift precedes or follows the direction for payment, provided a clear immediate gift can be found in the will. *In re Bartholomew*, 1 Mac. & G. 354; *Shrimpton v. Shrimpton*, 31 B. 425; *Maher v. Maher*, 1 L. R. Ir. 22.

Where the only gift is in the direction to pay, nothing vests till then.

The difficulty in these cases is to decide whether there is a substantive gift and a direction to pay, or whether the only gift is in the direction to pay. See *Shum v. Hobbs*, 3 Dr. 93; *Chaffers v. Abell*, 3 Jur. 577; *Williams v. Clark*, 4 De G. & S. 472; *Merry v. Hill*, 8 Eq. 619.

Direction to accumulate interest till 21 will not affect a gift already vested.

Of course, when there is a clear gift, a direction to accumulate the interest and to pay the principal and accumulations at twenty-one will not affect the vesting. *Stretch v. Watkins*, 1 Mad. 253; *Blease v. Burgh*, 2 B. 226; *Breedon v. Tugman*, 3 M. & K. 289.

Indoubtful cases the contingency may be reflected back and vice versa.

In doubtful cases the construction may be assisted by reference to other limitations; thus, where there was a gift for the children of a tenant for life, to be paid upon their attaining twenty-five, and if but one child, the whole to become the property of such only child, upon his attain-

ing twenty-five, and be transmissible to his heirs, executors, or administrators, none of the children took vested interests before twenty-five, the gift, in the event of there being an only child, being clearly contingent. *Judd v. Judd*, 3 Sim. 525; see *Hunter v. Judd*, 4 Sim. 455; *Merry v. Hill*, 8 Eq. 619.

Similarly, if the interest of an only child is clearly vested, this may show that a gift to all the children at twenty-one was meant to be vested too. *King v. Isaacson*, 1 Sm. & G. 371.

And it may appear from the context that the words "to be paid" were meant to refer to vesting and not to pay-<sup>Paid may mean</sup>vested. *Martineau v. Rogers*, 8 D. M. & G. 328.

3. The time when the legacy is to be paid must, how-<sup>Gift to be paid at a time which may never come in the legatee's life is</sup>ever, be certain; that is to say, it must be certain that the time will come if the legatee lives long enough. No doubt it is uncertain whether a legatee will ever attain a given age, but since he must attain it if he lives, this<sup>contingent.</sup> latter contingency is disregarded.

"When the time annexed to the payment is merely eventual, and may or may not come, and the person dies before the contingency happens, I can find no instance in this Court where it has been held that the legacy at all events should be paid." It becomes, in fact, a legacy upon condition, for *dies incertus conditionem in testamento facit*. Thus, a legacy to A. to be paid upon marriage is contingent. *Atkins v. Hiccocks*, 1 Atk. 500; *Ellis v. Ellis*, 1 Sch. & Lef. 1; *Morgan v. Morgan*, 4 De G. & Sm. 164; *In re Cantillon's Minors*, 16 Ir. Ch. 301; *Corr v. Corr*, 1 R. 7 Eq. 397; *Malcolm v. O'Callaghan*, 2 Mad. 349; *Taylor v. Lambert*, 2 Ch. D. 177.

But if interest is given in the meantime, the legacy will be vested, though given upon marriage. *Booth v. Booth*, 4 Ves. 399; *Vize v. Stoney*, 1 D. & War. 337.

It may be noticed, however, that a legacy given upon<sup>But a gift of interest in the meantime makes it vested. Gift upon</sup>

marriage construed as a gift at 21, or upon marriage under 21. marriage may be held upon the context to be given at twenty-one, or upon marriage under twenty-one, as where there was a gift to parents for life, and then to their children if then of age or married, and if any were infants at the death of their parents, then to them at twenty-one, if sons, or on marriage if daughters. *Lang v. Pugh*, 1 Y. & C. C. 719; see *West v. West*, 4 Giff. 198.

4. When the only gift is to be found in the direction to pay or divide :

Direction to pay after a life interest vests at once.

a. If the postponement of division or payment is merely on account of the position of the property, if, for instance, there is a prior gift for life, or a bequest to trustees to pay debts, and a direction to pay upon the decease of the legatee for life, or after payment of the debts, the gift in remainder vests at once. *Bennett's Trust*, 3 K. & J. 280; *Strother v. Dutton*, 1 De G. & J. 675.

Direction to pay at 21 will not vest till then.

b. But where the payment is deferred for reasons personal to the legatee, the gift will not vest till the appointed time.

Thus, a gift to a person at, or if, or as and when he shall attain, or upon attaining, or from and after attaining twenty-one, will not vest till the age is attained. *Hanson v. Graham*, 6 Ves. 239; *Locke v. Lamb*, 4 Eq. 372.

5. There are, however, several circumstances which may have the effect of vesting a gift contingent upon attaining a given age :

Contingent gift becomes vested by severance.

a. If the subject of the gift is to be at once separated from the rest of the estate, and vested in trustees to be for the benefit of the legatee, though the interest may not be given in the meantime, but directed to accumulate and go with the capital. *Love v. L'Estrange*, 5 B. P. C. 59; *Saunders v. Vautier*, Cr. & Ph. 240; *Greet v. Greet*, 5 B. 123; *Branstrom v. Wilkinson*, 7 Ves. 420; *Lister v. Bradley*, 1 Ha. 10; *Ingram v. Suckling*, 7 W. R. 386.

By gift of

b. If the interest upon the legacy, or upon the legatee's

presumptive share, is given to the legatee in the meantime <sup>the intermediate interest.</sup> till the time of payment arrives. *Hanson v. Graham*, 6 Ves. 239; *Hart's Trusts*, 3 De G. & J. 195; *Hardcastle v. Hardcastle*, 1 H. & M. 405; *Bell v. Cade*, 2 J. & H. 122; *Bolding v. Strugnell*, 24 W. R. 339; 45 L. J. Ch. 208.

This rule applies in the case of deeds. *Mostyn v. Brunton*, 17 Ir. Ch. 153.

(i.) The rule applies though the interest may be given subject to charges or annuities. *Lane v. Goudge*, 9 Ves. 225; *Jones v. Mackilwain*, 1 Russ. 220; *Potts v. Atherton*, 28 L. J. Ch. 486.

(ii.) Though the interest may be expressed to be given for maintenance. *Hart's Trusts*, 3 De G. & J. 195; *In re Bunn*; *Isaacson v. Webster*, 16 Ch. D. 47.

(iii.) It makes no difference, whether the interest is first given up to a given time and then the principal, or *vice versa*, at any rate, if the age fixed is either twenty-one or some later age, but such as to indicate that the testator has fixed upon it only from the probable incapacity of the legatees to manage their property satisfactorily earlier. *Wadley v. North*, 3 Ves. 364; *Westwood v. Southey*, 2 Sim. N. S. 192; *Bird v. Maybury*, 33 B. 351; *Pearman v. Pearman*, 33 B. 394; *Pearson v. Dolman*, 3 Eq. 315.

It seems doubtful whether *Spencer v. Wilson*, 16 Eq. 501, is in harmony with the general current of authority, or even with the views expressed in *In re Peek's Trusts*, *ib.* 221, 225.

On the other hand, if the interest is given up to a very advanced age, and the principal not till then, it is more doubtful whether the bequest would be vested. *Batsford v. Kebbel*, 3 Ves. 363; see *In re Bunn*; *Isaacson v. Webster*, 16 Ch. D. 47.

c. It seems not to be quite clearly settled whether, <sup>Effect of discretion to apply the whole</sup> where there is a discretion to trustees to apply the whole or part of the interest to the maintenance of the legatees, <sup>the whole</sup>

or part of the interest. the bequest will be vested. The better opinion now seems to be that it will. *Eccles v. Birkett*, 4 De G. & S. 105; *Rouse's Estate*, 9 Ha. 649; *Fox v. Fox*, 19 Eq. 286; *Parrott v. Davies*, 38 L. T. N. S. 52; see, however, *Pulsford v. Hunter*, 3 Bro. C. C. 416; *Ashmore's Trusts*, 9 Eq. 99; *In re Grimshaw's Trusts*, 11 Ch. D. 406.

It has been suggested, that where the accumulated surplus would go to the same legatees as the interest and capital, the legacy is vested; but where the surplus income is either expressly given over, or would not follow the capital, it is not; so that a gift of residue in such a case would be vested, whereas a particular legacy would not. See *Pearson v. Dolman*, 3 Eq. 315. But *quære* whether this distinction reconciles the cases.

Cases in which a gift of interest is not sufficient to vest contingent legacies.

But a discretion either to apply the interest to maintenance or to accumulate it will not vest the legacies: *Vaudry v. Geddes*, 1 R. & M. 203; nor, perhaps, will a discretion to apply the whole or part of the interest, not exceeding a fixed sum, to maintenance: *Merry v. Hill*, 8 Eq. 619; nor will the gift of a fixed sum for maintenance, though it may be equivalent to the interest of the legacy: *Boughton v. Boughton*, 1 H. L. 406; *Watson v. Hayes*, 5 M. & Cr. 125; *Livesey v. Livesey*, 3 Russ. 287.

And the gift of a sum for maintenance out of the personal estate not exceeding the income of the legacies will have no effect upon vesting. *Wynch v. Wynch*, 1 Cox, 433; *Rudge v. Winnall*, 12 B. 357.

A discretionary power given to trustees to apply the income for the benefit of the legatees, to the exclusion of any one or more of them, will not vest their shares. *In re Barnshaw's Trust*, 15 W. R. 378.

Effect of a gift of interest for a

d. Where interest is given only for a portion of the period before the time fixed for payment, if, for instance,

legacies are given at twenty-six, with interest for maintenance during minority, it is doubtful whether the gift will be vested; probably it will not without more. See the remarks in *Pearson v. Dolman*, 3 Eq. 315. In *Davies v. Fisher*, 5 B. 201; *Harrison v. Grimwood*, 12 B. 192; *Tatham v. Vernon*, 29 B. 604, there were other circumstances. And see *Hunter's Trusts*, L. R. 1 Eq. 295.

It may be noticed, that minority properly means the period before the attainment of twenty-one; though, if there is an intention expressed to that effect, it may mean the whole period during which the testator has kept the legatee out of the property. *Milroy v. Milroy*, 14 Sim. 48; *Maddison v. Chapman*, 4 K. & J. 709; 3 De G. & J. 536; *Fraser v. Fraser*, 1 N. R. 430.

e. Of course, where the interest is not given in the meantime, but is itself given at the same time as the principal, the gift does not vest. *Knight v. Knight*, 2 S. & St. 490; *Locke v. Lamb*, 4 Eq. 372.

f. A distinction must be drawn between the gift of a sum to each member of a class at twenty-one, with a gift of the interest upon the several shares in the meantime, and the gift of an aggregate fund to a class as they respectively attain twenty-one, with a direction that the whole interest is to be applied for their maintenance in the meantime; in the latter case, as the fund is to be kept together, and the whole interest applied for maintenance, nothing will vest before twenty-one. *Pulsford v. Hunter*, 3 B. C. C. 416; *Barker v. Lea*, T. & R. 413; *In re Ashmore's Trusts*, 9 Eq. 99; *In re Parker*; *Barker v. Barker*, 16 Ch. D. 44. Perhaps *In re Grimshaw's Trusts*, 11 Ch. D. 406, may be supported on this ground.

g. It seems a gift of personalty to A. till B. attains twenty-one, and then to B., will not give B. a vested interest: *Sullivan v. Edgell*, 23 W. R. 722; though it will where there is anything to show that A. takes in trust for B. on

portion of  
the period  
before  
vesting.

Gift of  
interest  
itself con-  
tingent.

Distinction  
between  
gift of in-  
terest upon  
a legacy  
to an  
individual  
and upon  
an aggre-  
gate fund  
given to a  
class.

Whether  
gift of  
personalty  
to A. till  
B. attains  
21, and

then to B., the principle already stated, *ante*, p. 412: *Lane v. Goudge*, 9 Ves. 225.

**Arguments in favour of vesting.** *h.* An argument in favour of vesting has sometimes been based upon a power to make advances. *Vivian v. Mills*, 1 B. 315; *Harrison v. Grimwood*, 12 B. 192; *Powis v. Burdett*, 9 Ves. 428; *Walker v. Simpson*, 1 K. & J. 713; see *Malden v. Maine*, 2 Jur. N. S. 206.

And the fact that the gift is residuary is also, it is said, in favour of vesting. *Booth v. Booth*, 4 Ves. 399; see *ante*, p. 414.

#### 6. Effect of a gift over upon vesting:

**A mere gift over upon death before the time of vesting has no effect.** *a.* It seems a mere gift over upon death under twenty-one will not have the effect of vesting a prior gift contingent upon attaining twenty-one, though the point is doubtful: *Ridgway v. Ridgway*, 4 De G. & S. 271; *Davies v. Fisher*, 5 B. 201; in both which cases there were other circumstances which alone would have been sufficient to vest the gift; and see *per* Sir J. Leach in *Bland v. Williams*, 3 M. & K. 411. The remarks, however, of Sir John Leach seem to be based on the theory that a gift over under twenty-one, the prior gift being at twenty-one, shows that the prior gift was not meant to be vested. The truer doctrine appears to be, that a gift over upon death under twenty-one neither shows that the prior gift was meant to be contingent, nor has the effect of making it vested. See *Re Baxter's Trusts*, 4 N. R. 131; *Malcolm v. O'Callaghan*, 2 Mad. 349; *In re Payne*, 25 B. 556.

**A clause of accruer is an argument for vesting.** *b.* But where the gift is to a class at twenty-one, followed by a clause of accruer giving the interests of those dying under twenty-one to the other members of the class (a direction which would be useless if the shares are contingent till twenty-one), there is a strong argument in favour of vesting. *In re Edmondson's Estate*, 5 Eq. 389.



c. It seems that a mere gift over upon the death of any of the legatees without issue will not vest contingent legacies. *Barker v. Lea*, T. & R. 413.

Gift over upon death without issue.

d. But a gift over upon death under twenty-one, and without issue, will vest a prior gift at twenty-one.

Gift over upon death without issue before the time of vesting.

The testator seems to imply that the legacy is to go over not upon failure to attain that age, but only in the events mentioned, and the attainment of the given age is therefore not a condition precedent to vesting. *Harrison v. Grimwood*, 12 B. 192; *Bland v. Williams*, 3 M. & K. 411; *Murkin v. Phillipson*, *ib.* 257; *Thomson's Trusts*, 11 Eq. 146.

e. But if the gift is to A. for life, then to her children at twenty-one, and if A. dies without issue, or without leaving issue over, the gift over has no effect upon the vesting, since it may have been intended to provide for the death of all the children before the tenant for life. *Walker v. Mower*, 16 B. 365; *Wrangham's Trusts*, 1 Dr. & Sm. 358; *Kidman v. Kidman*, 40 L. J. Ch. 359; see *Wetherall v. Wetherall*, 1 D. J. & S. 134.

Effect of gift over upon death of the parent without issue upon contingent bequests to the children.

On the other hand, if the gift is to children living at the death of the tenant for life, as they attain twenty-one, a gift over on the death of the tenant for life without leaving issue will afford a strong argument in favour of vesting, since it is ineffectual if the children survive the parent and die under twenty-one. *Bree v. Perfect*, 1 Coll. 128.

7. When the gift is to a class when the youngest attains twenty-one, it is clear that all who attain twenty-one will take vested interests. *Leeming v. Sherratt*, 2 Ha. 14; *Parker v. Sowerby*, 1 Dr. 488; see 4 D. M. & G. 321; *Smith's Will*, 20 B. 197; see *Sansbury v. Read*, 12 Ves. 75; *Ford v. Rawlins*, 1 S. & St. 329; *In re Hunter's Trust*, L. R. 1 Eq. 295.

Gift to a class when the youngest attains 21.

It has, however, been said, that those who die under twenty-one will not take vested interests: see the cases

Whether those dying under 21

are ex-  
cluded.

*supra cit.*; but in them the exact point does not appear to have arisen for decision, and to import the contingency of attaining twenty-one into the constitution of the class seems contrary to principle.

At any rate, in such a case, if the gift is not to a class, but to individuals named, they take vested interests. *Cooper v. Cooper*, 29 B. 229; see *Re Lyman's Trust*, 2 L. T. N. S. 662.

So, too, if the income is given to the class till the youngest attains twenty-one, and then the principal, they all take vested interests. *Grove's Trusts*, 3 Giff. 575; *Re Andrew*, 8 L. J. Notes of Cases 174; see *Boulton v. Pilcher*, 29 B. 633.

And if there is a clear gift to the class, a direction that it is to be divided when the youngest attains twenty-one will not postpone the vesting. *Knox v. Wells*, 2 H. & M. 674; see *Hilliard v. Fulford*, 28 L. T. N. S. 892; 42 L. J. Ch. 624; *Blasson v. Blasson*, 2 D. J. & S. 665.

III. Gifts to children contingent upon surviving their parents.

1. In many cases where a gift to children has been made contingent upon their surviving their parents, the Courts have laid hold of slight ambiguities to give them vested interests at birth. Most of the cases upon this subject have arisen on marriage settlements where there is a strong presumption of intention to provide for children generally, whereas gifts by will are mere bounty. *Farrer v. Barker*, 9 Ha. 743; but see *Jackson v. Dover*, 2 H. & M. 209.

Words of  
contingency  
must have  
their full  
force in  
settle-  
ments as in  
wills.  
Gifts to

It is, however, now clearly settled that in marriage settlements, as in wills, words of contingency must have their full force, and the Court will "lean" in favour of vesting only in cases of doubtful construction. *Whatford v. Moore*, 3 M. & Cr. 289; *Jeyes v. Savage*, 10 Ch. 555.

Thus a gift, after life interests to parents, to the children

living at their decease, or if there are any children then living to *such* children, only goes to those who survive their parents; *a fortiori* if provision is made for the issue of children who die before their parents leaving issue. *Jeyes v. Savage, supra*; *In re Deighton's Settled Estates*, 2 Ch. D. 783.

The fact that the word "such" is sometimes omitted in some of the limitations will not cause its rejection, if it occurs in the limitation under which the children take.

*Whatford v. Moore*, 3 M. & C. 270; *Skipper v. King*, 12 B. 29; *Wilson v. Mount*, 19 B. 292.

But, it would seem, it may be rejected, if it appears on the whole will that it is incorrectly used. *Howgrave v. Cartier*, 3 V. & B. 79; see *Rye v. Rye*, 1 L. R. Ir. 413.

And if the parent has power to pay over their shares to *such* children in his lifetime, the contingency of surviving the parent will be rejected, since the testator cannot have meant shares paid to children who die before their parents to be returned. *Powis v. Burdett*, 9 Ves. 428; *Walker v. Simpson*, 1 K. & J. 713.

Where the interest was given for the maintenance of such children as should be living at the parents' decease until they should attain twenty-one, followed by a gift to the children when they attained twenty-one, it was held that children who attained twenty-one took vested interests, though they predeceased their parents. *Bradley v. Barlow*, 5 Ha. 589.

2. And there may be sufficient evidence of intention to show that children dying before their parents were to take vested interests, though the original gift is contingent upon their surviving them.

Thus, if there is a direction that children are to take vested interests at twenty-one, or upon marriage, "though such respective times may happen before the parents' de-

children living at their parents' death.

Force of the word "such."

It may be rejected if inaccurate. ly or inconsistently used.

Gift contingent upon surviving a parent explained by context.

cease," the prior gift is controlled. *Dalton v. Hill*, 10 W. R. 396.

The same is the case, if the shares of the children are expressly referred to by the testator as payable in their parents' lifetime, and directed not to be paid till their deaths. *Jackson v. Dover*, 2 H. & M. 209.

But the mere fact, that the interests are to be vested at twenty-one, but not to be transferred till after the parents' death, will not give children dying before their parents vested interests, the word vested being read as equivalent to payable. *Williams v. Haythorne*, 6 Ch. 782.

But if the direction is that children, who attain twenty-one, or die under that age leaving issue, are to take vested interests, the direction will control the contingency, and children who attain twenty-one and die before their parents will take vested interests. *Williams v. Russell*, 10 Jur. N. S. 168.

Gift to children who survive their parents may be vested by the effect of the gift over.

3. So, too, children will take vested interests before their parents' death, if the property is given over in events which do not include the death of some of the children over twenty-one in their parents' lifetime, so that in that event the property would be undisposed of. *Perfect v. Lord Curzon*, 5 Mad. 442; *Torres v. Franco*, 1 R. & M. 649; *Swallow v. Binns*, 1 K. & J. 417; *Dixon v. Barkshire*, 34 B. 537.

Gift to a class upon a contingency.

4. In cases, where there is a gift to a class of children, if any children survive their parents, it is clear, that unless some children survive the parents the gift never arises. *Hotchkin v. Humfrey*, 1 Mad. 65; *Fitzgerald v. Field*, 1 Russ. 430.

The contingency is not to be imported into the constitution of the class.

But the contingency will not, without express words, be imported into the constitution of the class, so that if the contingency happens all members of the class will take whether they survive the contingency or not; thus, if there is a gift to A. for life, and then if he die leaving a

child, to his children as tenants in common, and one child survives A., all his children, whether they survive him or not, will take. *Boulton v. Beard*, 3 D. M. & G. 608; *M'Lachlan v. Taitt*, 28 B. 407; 2 D. F. & J. 449; *Re Gratwicke*, 35 B. 315; *Re Orlebar's Settlement*, 20 Eq. 711; *Goddard's Trusts*, 1 R. 5 Eq. 14; see *Blasson v. Blasson*, 2 D. J. & S. 665; *Taylor v. Graham*, 3 App. C. 1287.

Similarly, powers of raising different sums according to the number of children a man may have, will not be limited to mean the number of children capable of taking. *Knapp v. Knapp*, 12 Eq. 238; *In re Verschoyle's Trusts*, 3 L. R. Ir. 43; see *Rye v. Rye*, 1 L. R. Ir. 413.

But if the gift is to the children of A. if he leaves any him surviving, and there is a gift over if A. leaves no children him surviving, it would seem only children surviving A. would take. *Winn v. Fenwick*, 11 B. 438; *Wilson v. Mount*, 2 W. R. 448; 19 B. 292; *Stevens v. Pile*, 30 B. 284; *Stolworthy v. Sancroft*, 12 W. R. 635.

Of course, if the gift is in the event of there being any children surviving at a particular time to "such" children, only those who survive the contingency can take, but the Court will not supply the word "such" if it does not occur in the limitation under which the children take, so as to cut down the class, though the omission may be accidental. *Woodcock v. Duke of Dorset*, 3 B. C. C. 569, corrected in 3 V. & B. 83; *King v. Hake*, 9 Ves. 439; *Stolworthy v. Sancroft*, 12 W. R. 635.

If there is a gift in remainder or upon a contingency to a class, which would give the members of the class vested interests immediately, or upon the happening of the contingency, and there is a direction that if there be but one child living at the period of distribution, or when the contingency happens, the whole is to go to that child, the contingency of being then living, has in several cases been reflected back into the constitution of the original class.

Effect of gift over if no one of the class survive the contingency.

The word "such" will not be supplied so as to make a gift contingent.

Contingency reflected back.

*Smith v. Vaughan*, 8 Vin. Ab. 381, tit. Devise (Z. c.), pl. 32; *Spencer v. Bullock*, 2 Ves. jun. 687; *Madden v. Ikin*, 2 Dr. & S. 207; *Lewis v. Templer*, 33 B. 625; *Cooper v. Macdonald*, 16 Eq. 258.

The point cannot, however, be said to be settled beyond dispute in the face of *Kimberley v. Tew*, 4 D. & War. 139.

To what  
the word  
"then"  
refers.

5. When there is a gift after prior interests to persons "then living," the word then refers most naturally to the last antecedent; thus, in the case of a gift to A. for life, remainder to B. for life, remainder to a class "then living," the word then refers to B.'s death, whether he dies before A. or not. *Archer v. Jegon*, 8 Sim. 446; *Wollaston's Settlement*, 27 B. 642; *Powis v. Matthews*, 11 W. R. 662; *Olney v. Bates*, 3 Dr. 319; *Heasman v. Pearse*, 7 Ch. 661.

On the other hand, if the object of the testator is not to limit successive interests, but to provide for personal enjoyment by the legatees by substituting for persons dying before the period of enjoyment a class of persons then living, the word then refers most naturally to the period of enjoyment. *Harvey v. Harvey*, 3 Jur. 949; *Hetherington v. Oakman*, 2 Y. & C. C. 299; *Gill v. Burrett*, 29 B. 373; see, too, *Heasman v. Pearse*, 7 Ch. 275.

It may be noticed that in a gift to several persons nominatim and their children then living, the contingency of being then living will not be applied to the parents as well as the children, unless there is something to show that parents and children were to form one homogeneous class. *Burrell v. Baskerfield*, 11 B. 255; *Cormack v. Copous*, 17 B. 397; *Turner v. Hudson*, 10 B. 222.

Stirpital  
construction  
of the  
words  
"then  
living."

For cases, in which a stirpital construction may be given to the words "then living," see *Cooper v. Macdonald*, 16 Eq. 258; and see *Survivors*.

IV. Vesting of interests under powers of appointment.

Where there is a gift to certain persons as A. shall appoint, or a power to appoint certain property, and a gift in default of appointment, the persons to take in default of appointment take vested interests at the testator's death, subject to be divested by the exercise of the power. *Doe d. Willis v. Martin*, 4 T. R. 39; *Fearne*, C. R. 225.

From what  
time  
persons  
taking  
under a  
power  
take vested  
interests.

Thus a gift to children as A. shall by will appoint vests in all the children, but an appointment of the whole in favour of an only surviving child is good. *Woodcock v. Renneck*, 4 B. 190; 1 Ph. 72.

If, however, the power is exercised in favour of the same persons as would have taken in default of appointment, a question arises, whether the appointees are to be considered as taking under the original will or under the power.

It seems clear, that where the will authorises an appointment among persons, who would not all take in default of appointment, the appointees take under the exercise of the power. *Lee v. Olding*, 25 L. J. Ch. 580; 2 Jur. N. S. 850; *Vizard's Trusts*, L. R. 1 Ch. 588; *Sweetapple v. Horlock*, 48 L. J. Ch. 660.

Even if the power is merely distributive, so that the persons to take under the appointment and in default are the same, they take, nevertheless, under the exercise of the power, and not under the instrument creating it. *De Serre v. Clarke*, 18 Eq. 587.

Where a person on his marriage covenants to settle a share to which he is entitled in default of appointment, and the donee of the power subsequently appoints to him, the covenant is not void under section 91 of the Bankruptcy Act, 1869, as relating to property in which the bankrupt had no interest at the date of his bankruptcy. *Re Andrews' Trusts*, 7 Ch. D. 634.

## CHAPTER XXXIV.

### PERPETUITY AND ACCUMULATION.

A GIFT by a foreign will of leaseholds in England is governed by the rules of English law relating to perpetuity and accumulation. *Freke v. Lord Carbery*, 16 Eq. 461.

Direction to buy land in foreign country to be settled on remote uses.

A direction to lay out money in the purchase of land in Scotland, to be settled to uses which are good according to Scotch law, but would be void for remoteness in England, is valid. *Fordyce v. Bridges*, 2 Ph. 497, 515.

Rule against remoteness stated.

A limitation by way of executory devise is void as too remote, if it is not to take effect until after the determination of one or more lives in being and upon the expiration of twenty-one years afterwards, as a term in gross and without reference to the infancy of any person who is to take under such limitation, or of any other person, allowance for gestation being made only in those cases where it actually exists. *Cadell v. Palmer*, 1 Cl. & F. 372.

Gift over of property given to charity is good however remote.

The object of the rule is to limit the inalienability of property, it does not therefore apply, where money given to charity is given over upon a remote event, the effect of the gift over being to make inalienable property alienable. *Christ's Hospital v. Grainger*, 16 Sim. 83; 1 Mac. & G. 460.

The rule does not apply to legal remainders.

It has been much debated, whether the rule against perpetuity applies to legal remainders, but it appears to be now settled that it does not. See *Cole v. Sewell*, 4 D. & War. 1; 2 H. L. 186.



On the other hand, though remainders are not subject to the doctrine of perpetuity, they are controlled by an analogous doctrine, that no estate by way of remainder can be limited to the unborn son of an unborn person, whether expressly limited to take effect within the limits of perpetuity or not; so that, for instance, in a limitation to A. an unmarried person for life, remainder to his first son for life, remainder to the first son of the first son of A., born in A.'s life, or within twenty-one years afterwards, in fee, the ultimate remainder in fee would be bad, though clearly within the limits of perpetuity. 2 Rep. 51 a; 10 Rep. 50 b.; *Monypenny v. Dering*, 2 D. M. & G. 145.

Legal remainder to unborn son of unborn person void.

The practical result of this rule is, that legal remainders are, in fact, confined within narrower limits as regards perpetuity than other limitations, since there seems no reason to doubt, that the limitation above-mentioned would be good in the case of executory limitations.

There seems to have been no decision upon the precise point, whether legal remainders can be too remote, though *Cole v. Sewell*, *supra*, has been supposed to be such a decision.

Whether *Cole v. Sewell* is a direct decision on the question whether a legal remainder can be too remote.

In that case, after limitations in tail in favour of particular lines of issue, there was a gift over upon a general failure of issue, and it was held that the gift over was good, being a legal remainder, and therefore barrable as long as it subsisted. The decision, it is said, must have proceeded on the exact ground, that the remainder was not void for perpetuity because it was a legal remainder, since the rule is that a limitation other than a legal remainder, if limited upon an event too remote, is bad, even though the previous estates may be in tail, unless the event must take place before the determination of the prior estates, or in other words, unless the limitation over is always barrable; and in

*Cole v. Sewell* there might have been a failure of the particular lines of issue before a failure of issue generally, so that if the remainder had been equitable it would have been bad.

But, it may very well be said, that the decision in *Cole v. Sewell*, in the House of Lords, was that the remainder was good, not because it was a legal remainder, but because, being a legal remainder, it was always barrable as long as it subsisted.

The doctrine of perpetuity was excluded not because the remainder was legal but because it was barrable.

It does not follow that it would have been good if the prior estates had not been estates tail.

The fact that legal contingent remainders after an estate tail must be barrable as long as they are contingent, since they fail by the failure of the prior estate, is in itself no argument for saying that they are good because they are remainders, and not because they are always barrable.

Opinion of  
Ferne.

On the other hand, it seems that Ferne considered that the doctrine of perpetuity was applicable to remainders. "Any limitation in future," he remarks, "or by way of remainder, of lands of inheritance, which in its nature tends to a perpetuity, even although there be a preceding vested freehold, so as to take it out of the description of an executory devise, is by our Courts considered as void in its creation." See *Cont. Rem.* 501 (ed. 10th, 1844).

It is true he goes on to quote as an instance a limitation of lands in succession first to a person *in esse*, and after his decease to his unborn children, and afterwards to the children of such unborn children, which is admitted to be void by those who deny that the doctrine of perpetuity applies to remainders; but he seems to have meant that such a limitation would be void for perpetuity

and not as a possibility upon a possibility, so that if limited to take effect within the bounds of perpetuity it would be valid.

Lord Hatherley, too, in *Catlin v. Brown*, 11 Ha. 377, <sup>Of Lord Hatherley and Jarman.</sup> lays down the same principle; and the opinion of Mr. Jarman, though not of his editors, is to the same effect. See 3rd. ed., vol. i., p. 232.

On the other hand, the authority for the second <sup>Authority for the second branch of the rule.</sup> branch of the rule, namely, that a limitation by way of remainder to the unborn son of an unborn person, is bad in itself, independently of remoteness, is entirely unsupported by decision, and is in fact a survival of the old doctrine, that there cannot be a possibility upon a possibility, which, if it ever existed (see *Duke of Norfolk's Case*, 3 Ch. C. 1, Lord Northington's judgment), has long since been exploded for all other purposes; and the numerous dicta, which lay down that a devise by way of a remainder to the unborn son of an unborn person is void, might very well be understood as laying down no more, than that such a limitation is void because it is too remote, and not because it is to the unborn son of an unborn son.

As Lord St. Leonards points out, "A limitation like this is clearly void by reason of its tendency to a perpetuity, independently of the technical objection of its being a possibility upon a possibility, which probably means the same thing." Powers, p. 393. If it does mean the same thing, a devise by way of remainder to the son of an unborn son if born within the life of his grandfather, or within twenty-one years afterwards, being within the limits of perpetuity, would be good.

Mr. Joshua Williams argues against the validity of <sup>Argument of Mr. Joshua Williams.</sup> such limitations, because no conveyancer has ever embodied them in a settlement. But the mere fact that their validity is doubtful, would be sufficient to deter a

careful conveyancer, much more the Court of Chancery, from adopting them in a settlement. To insert them would, in fact, be to bring about the decision of a speculative point of law at the expense of a client, which is what a conveyancer exists to prevent. Again, there seems no reason to suppose, that such limitations are invalid with regard to personalty, to which the doctrine of a possibility upon a possibility never had any application, nor does Mr. Williams extend it to personalty. (See *Personal Property*, p. 268.) Yet such a settlement appears to be no more common in the case of personalty than of realty. And, indeed, it is doubtful whether settlors or testators desiring to tie up their property, would prefer the limitations here discussed to those ordinarily introduced into settlements, since their effect would be, not to tie up property one day longer than can be done by other means, but to favour more remote at the expense of less remote descendants.

Arguments in favour of extending the rule against remoteness to legal remainders.

If, then, amid this conflict of authority, it were possible to consider the question as one of first impression, the main arguments in favour of extending the rule against perpetuities to remainders, would seem to be, in the first place, the advantage of one uniform rule as applicable to every form of limitation, and in the second place, that it would no longer be necessary to put in force the old doctrine against a possibility upon a possibility, which is at the best of doubtful validity.

Arguments of Mr. Tudor.

It is not unusual to find other arguments brought forward in favour of extending the rule of perpetuity to remainders, but it may be doubted whether they are entitled to great weight.

Lord St. Leonards, in *Cole v. Sewell*, 4 Dr. & War. 1, says, "It is now perfectly settled that where a limitation is to take effect as a remainder, remoteness is out of the question, for the given remainder is either a vested re-

mainder, and then it matters not whether it ever vest in possession, because the previous estate may subsist for centuries, or for all time; or it is a contingent remainder, and then by the rule of law, unless the event upon which the contingency depends happen, so that the remainder may vest *eo instanti* the preceding limitation determines, it can never take effect at all,\* p. 28.

To this Mr. Tudor replies, that this reasoning does not apply when the estates are equitable, or when there are trustees to preserve contingent remainders. Tudor, Leading Cases, 2nd ed., 409; 3rd ed., 473.

Equitable estates, however, are not, properly speaking, remainders at all, but in the nature of executory interests, and as such subject to the ordinary rule against perpetuity.

And, on the other hand, it would be difficult to frame a limitation to trustees to preserve contingent remainders, followed by a limitation which should be at once a good legal remainder, and obnoxious on account of remoteness. The trustees could not take a fee, nor could they take a determinable fee, for no remainder could then be limited. *Seymour's Case*, 10 Co. 95 b.; Tudor, Leading Cases, 616. They must, therefore, either take in tail or for life. No doubt, in the former case, property might frequently be tied up for a very considerable time, since the trustees would have no motive for barring their estate tail; but even if they did not, the remainder might still fail by failure of issue of the trustees at any time before the remainder could take effect. See *Dawkins v. Lord Penrhyn*, 4 App. C. 51, 60.

Of course, if the trustees take for life only, since the legal remainder must take effect within lives in being or not at all, there could be no objection on the score of remoteness.

An equitable contingent remainder, which may not take effect within the limits of perpetuity, will not become valid <sup>Equitable</sup> remainder.

if the contingency happens during the subsistence of the particular estate. For instance, a devise to trustees on trust for A. for life and then for the first son of B. who attains twenty-five is void, though a son of B. attains twenty-five in A.'s lifetime. *In re Finch*; *Abbiss v. Burney*, 28 W. R. 903; 29 W. R. 449.

The rule is to be applied to the state of things existing at the testator's death. In applying the rule against perpetuities, the state of things existing at the testator's death, and not at the date of the will, is to be looked at. *Vanderplank v. King*, 3 Ha. 17; *Cattlin v. Brown*, 11 Ha. 382; *Peard v. Kekewich*, 15 B. 173.

Possible not actual events are to be considered.

But possible and not actual events are to be considered, and, therefore, if at the testator's death a gift might possibly not have vested within the proper time, it will not be good, because, as a matter of fact, it did so vest. *Lord Dungannon v. Smith*, 12 Cl. & F. 546; see *In re Roberts*; *Repington v. Roberts*, 50 L. J. Ch. 265.

That a woman past child-bearing may have children is a possible event within the rule.

The fact that a woman is past the age of child-bearing at the date of the will or death, is not to be considered, and the chance of such a woman having children is a possible event for the purposes of determining whether a gift is void for perpetuity or not. *Jee v. Audley*, 1 Cox, 324; *In re Sayer's Trusts*, 6 Eq. 319; see *Cooper v. Laroche*, 43 L. T. N. S. 794; 29 W. R. 438.

Gift tending to tie up property for an indefinite time is void.

Any gift not being charitable, the object of which is to tie up property for an indefinite time, is void; as, for instance, a devise of land to the trustees of the Penzance Library, to hold to them and their successors for ever, for the maintenance and support of the library. *Carne v. Long*, 2 D. F. & J. 75; *Thompson v. Shakespear*, 1 D. F. & J. 399; *Neo v. Neo*, L. R. 6 P. C. 381; *In re Clark's Trust*, 1 Ch. D. 497; *Re Dutton*, 4 Ex. D. 54.

So, too, a restriction upon alienation beyond lives in being and twenty-one years after, is bad. *Armitage v. Coates*, 35 B. 1; *In re Teague's Settlement*, 10 Eq. 564;

*In re Cunninghame's Settlement*, 11 Eq. 324; *In re Michael's Trusts*, 46 L. J. Ch. 651.

It has been suggested that a restraint upon anticipation in the case of a married woman ought to be treated as an exception to the rule against perpetuity, as the object of the restraint is to preserve for the married woman the beneficial enjoyment of her property. *In re Ridley; Buckton v. Hay*, 11 Ch. D. 645.

A direction that lands devised by the testator shall be leased for ever at an undervalue to his wives' kindred is void. *A.-G. v. Greenhill*, 33 B. 193; see, too, *Hope v. Corporation of Gloucester*, 7 D. M. & G. 647; *Pollock v. Booth*, I. R. 9 Eq. 229, 607.

So, too, a direction not to raise the rent of lands devised is invalid. *A.-G. v. Catherine Hall*, Jac. 381.

It is clear that a devise of property to a named person to take effect upon a remote event is void. See *Bankes v. Holme*, 1 Russ. 394 n.; *Lewis v. Templer*, 33 B. 625; *Commissioners of Donations v. De Clifford*, 1 Dr. & War. 245, 254.

Where a lease for fifty-four years was bequeathed for life with remainders, followed by a direction upon the expiration of the lease to convey freeholds of the testator upon the same trusts, it was held that the direction was not void for perpetuity. *Wood v. Drew*, 33 B. 610.

No questions with regard to remoteness can arise on limitations subsequent to an estate tail, provided the subsequent limitations must take effect, either during the existence of the estate tail or at the moment of its determination. *Cole v. Sewell*, 4 Dr. & War. 1; 2 H. L. 186; *Doe d. Winter v. Perratt*, 9 Cl. & F. 606; *Heasman v. Pearse*, 7 Ch. 275.

The foundation of this rule is, that if the subsequent limitations are such, that they must take effect during the existence of the estate tail, or at the moment of its

Restraint upon anticipation.

Direction to lease for ever at low rent.

Direction not to raise rents.

Devise upon remote event.

Whether limitations subsequent to an estate tail can be too remote.

The test is that they must be barrable as long as

they sub-  
sist.

determination, or not at all, they are always barrable, and therefore do not tend to restrain the free disposal of property.

And the converse follows, that, if the subsequent limitations are not always barrable, they will be subject to the rules of remoteness. The rule is sometimes laid down absolutely, that no limitations after estates tail are too remote, but it can only be accepted with the qualification above laid down. Otherwise, by means of limitations of equitable remainders which do not fail by failure of the prior estates, and are not barrable after the estate tail has determined, property might possibly be tied up for an almost indefinite time.

There seems to be no express decision on the point, but the rule as above laid down is involved in the decisions in *Lady Lanesborough v. Fox*, Ca. temp. Talbot, 262; *Tregonwell v. Sydenham*, 3 Dow. 194.

The trusts  
of a term  
precedent  
to an estate  
tail may be  
void for re-  
mote-  
ness.

Where interests are precedent to estates tail, they are, of course, not barrable, and the ordinary rules of perpetuity apply. Therefore, where a term precedent to estates tail is limited to trustees, upon trusts which are too remote, the trusts are void. *Case v. Drosier*, 2 Kee. 764; 5 M. & Cr. 246.

And where the term is precedent this will be the case, even though the event in which the trusts are to be executed would become impossible if the subsequent estates tail were barred. *Sykes v. Sykes*, 13 Eq. 56.

Concur-  
rent terms.

Similarly, powers not strictly precedent to, but concurrent with, an estate tail, for instance, powers to accumulate, during the minorities of any persons entitled under the limitations of the will, whether the accumulations are expressly carried over or not, or to enter and manage the property, are void. *Marshall v. Holloway*, 2 Sw. 432; *Lord Southampton v. Marquis of Hertford*, 2 V. & B. 54; *Browne v. Stoughton*, 14 Sim. 369;



*Turvin v. Newcome*, 3 K. & J. 16; *Floyer v. Banks*, 8 Eq. 114.

But a trust for accumulation for the purpose of paying off debts or incumbrances upon the estate of the testator is valid. *Lord Southampton v. Marquis of Hertford*, 2 V. & B. 54, 65; *Bateman v. Hotchkin*, 10 B. 426; *Briggs v. Earl of Oxford*, 1 D. M. & G. 363.

Trust for accumulation to pay debts is good.

And a direction to accumulate a fund till it reaches a certain amount, and then to apply it for the benefit of certain named persons for their lives, and the life of the survivor, is not void for perpetuity, if the fund, whether it has reached the amount directed or not, is to be divided at the death of the survivor. *Oddie v. Brown*, 4 De G. & J. 179.

A direction to accumulate till a fund reaches a certain sum.

No doubt powers of sale and leasing would be void, if the testator clearly shows that he intended them to subsist, or to arise beyond the limits of perpetuity: see *Ware v. Polhill*, 11 Ves. 257; *Hale v. Pew*, 25 B. 335.

Power of sale and leasing.

But powers of sale, whether collateral or subsequent, though given in general terms in a settlement containing limitations for life, with remainders in fee or in tail, with an ultimate remainder in fee, are good, because the power is spent as soon as the object of the settlement is at an end by the absolute interest vesting in possession. *Biddle v. Perkins*, 4 Sim. 135; *Nelson v. Callow*, 15 Sim. 353; *Waring v. Coventry*, 1 M. & K. 249; *Lantsbery v. Collier*, 2 K. & J. 709; *Taite v. Swinstead*, 26 B. 525.

The vesting of property may be postponed for any length of time, provided it must ultimately vest, if at all, in persons born at the death of the testator, and living at the time of vesting, since in such a case it must vest absolutely within lives in being. *Lachlan v. Reynolds*, 9 Ha. 796.

Gift to persons who must be living at the testator's death and at the time of vesting cannot be too remote

But the gift is void for perpetuity, though it must vest in persons born within lives in being at the testator's

death, and living when the event happens, if it may not so vest within lives in being and twenty-one years afterwards. *Jee v. Audley*, 1 Cox, 324; see *Garland v. Brown*, 10 L. T. N. S. 292.

*Avern v. Lloyd.*

It has been held, that in a gift to A. and B. for life, remainder to their issue for life, and after the decease of the survivor to the executors and administrators of the survivor of A. and B. or their issue, who should happen to be such survivor, the last remainder is not void for perpetuity. *Avern v. Lloyd*, 5 Eq. 383.

It seems clear that if the gift in remainder were construed to be to such one of the class composed of A. and B., and the issue living at their respective deaths, as should be the longest liver, it would be void for remoteness, since, though the class to take would be fixed within lives in being, the absolute vesting might be postponed till the death of all the issue but one.

On the other hand, if the gift could be construed to be to the issue living at the death of A. and B., or to the survivor of A. and B., if there are no issue to take, it would be good, since it must vest absolutely on the death of A. and B. But the case is doubtful. See *Stuart v. Cockerell*, 7 Eq. 363.

Gift for life to unborn children of a tenant for life is good.

A limitation for life to the unborn children of a tenant for life is good. *Avern v. Lloyd*, 5 Eq. 383; *Stuart v. Cockerell*, 7 Eq. 363; see 5 Ch. 713; *Hampton v. Holman*, 5 Ch. D. 183, overruling *Hayes v. Hayes*, 4 Russ. 311.

Cross limitation between unborn tenants for life.

There appears to be no doubt that cross limitations for life between unborn tenants for life would be valid, and moreover, that limitations for life to successive generations to come into being within the bounds of perpetuity are also valid. *Ashley v. Ashley*, 6 Sim. 358; *Cadell v. Palmer*, 1 Cl. & F. 372; see, however, *Stuart v. Cockerell*, 7 Eq. 363, p. 370.

Upon the same principle a limitation to the unborn children of a tenant for life, and the survivors and survivor of them, during the life of the longest liver, would be good, since the persons in whom the fee must vest, *i.e.*, all the children of the tenant for life, and the heir at law, would be ascertained at the death of the tenant for life. *Gooch v. Gooch*, 14 B. 565; 3 D. M. & G. 366.

If, however, the limitation is not simply to the survivors of the tenants for life, but to the survivors if there is no issue of the tenant for life dying, and if there is issue, then to the issue, the limitations over are bad. *Gooch v. Gooch*, 14 B. 565; 3 D. M. & G. 366, 384.

Possibly, a gift over in certain events of the life interest of an unborn tenant for life would be void for remoteness. See *Hodgson v. Halford*, 11 Ch. D. 959.

After life interests to unborn persons, the absolute interest can be given to persons either living at the death of the testator or ascertained within the limits of perpetuity. *Evans v. Walker*, 3 Ch. D. 211.

But the absolute interest cannot be limited to a person who may not be ascertained within lives in being and twenty-one years afterwards. For instance, after life interests to unborn children a limitation to the eldest grandchild living at the determination of the life estates, or a limitation to the survivor of the tenants for life, would be void. *Gooch v. Gooch*, 3 D. M. & G. 366; *Garland v. Brown*, 10 L. T. N. S. 292.

Limitations following upon limitations void for perpetuity are themselves void, whether within the line of perpetuity or not. *Procter v. Bishop of Bath and Wells*, 2 H. Bl. 358; *Brudenell v. Elwes*, 1 East, 442; *Beard v. Westcott*, 5 Taunt. 393; 5 B. & Ald. 801; T. & R. 25; *Thatcher's Trust*, 26 B. 365.

On the other hand, where the limitations are not subsequent but alternative, one of them being valid and the

Substitution of issue.

Remote gift over of life interest.

Remainders after life interests of unborn persons.

Limitations dependent on void limitations are themselves void.

Alternate contingent limitations.

other too remote, effect will be given to the valid alternative, if the events on which it is limited occur. *Longhead v. Phelps*, 2 W. Bl. 704; *Crompe v. Barrow*, 4 Ves. 681; *Monypenny v. Dering*, 2 D. M. & G. 145; *Doe v. Challis*, 18 Q. B. 244; 7 H. L. 531; *Hodgson v. Halford*, 11 Ch. D. 959; *Miles v. Harford*, 12 Ch. D. 691, 703.

Gift to a class to be ascertained beyond the limits of perpetuity is void.

Where there is a gift to a class, any members of which may have to be ascertained beyond the limits of perpetuity—for instance, to the children of a living person who shall attain twenty-five—the whole gift is void. *Leake v. Robinson*, 2 Mer. 363; *Boughton v. Boughton*, 1 H. L. 406; *Merlin v. Blagrove*, 25 B. 125; *Stuart v. Cockerell*, 7 Eq. 363; 5 Ch. 713; *Patching v. Barnett*, 49 L. J. Ch. 665.

Similarly, where there is a gift after the death of an unborn tenant for life to the children and grandchildren of a living person, the gift is void for remoteness, the children and grandchildren being intended to form one class. *Stuart v. Cockerell*, 7 Eq. 363; 5 Ch. 713.

But if the remoter issue are to take substitutionally, the gift to the original class will be good, though the substitutional gifts may be void for remoteness. *Baldwin v. Rogers*, 3 D. M. & G. 649; *Packer v. Scott*, 33 B. 511.

Whether a gift to an individual and a remote class is void.

The rule against perpetuity applies where the gift is to a remote class, and a named person as tenants in common, the shares not being ascertainable within the proper limits. *Porter v. Fox*, 6 Sim. 485.

Perhaps, however, it would not apply to a similar gift in joint tenancy. 1 Jarman, 252.

If by the application of the rules for ascertaining the class the class must be finally ascertained within the limits of perpetuity, the gift is good. *Picken v. Matthews*, 10 Ch. D. 264.

Distinction between gift of a fund to a

Where particular sums are given to each of the members of a class, the gift is good as to those members who are within the limits of perpetuity. *Storrs v. Benbow*, 2

M. & K. 46; 3 D. M. & G. 390; *Wilkinson v. Duncan*, 30 B. 111. class and gift of a sum to each member of a class.

This principle has been extended to cases where, though the gift is in terms to a class, the effect of it is to give definite sums, ascertained at the determination of lives in being, to each of several classes, some of which are within and some without the line of perpetuity; for instance, if the gift is to A. for life, remainder to A.'s children for life, and the share of each child to go to his children, since the share of each of A.'s children is ascertained at A.'s death, the effect is to give a definite sum to each group of A.'s grandchildren, and the gift is good as regards those grandchildren whose parents were born in the testator's lifetime. *Griffith v. Pownall*, 13 Sim. 393; *Catlin v. Brown*, 11 Ha. 372; *Knapping v. Tomlinson*, 12 W. R. 784; 10 Jur. N. S. 626. Cases where it is possible to sever valid and remote shares.

And the principle is the same, where the gift is to A. for life, then to A.'s children living at his death, who should attain twenty-one, the share of each daughter to be settled on her for life, remainder to her children. In such a case the direction to settle was held good with regard to a child of A. *in esse* at the testator's death. *Wilson v. Wilson*, 4 Jur. N. S. 1076; 28 L. J. Ch. 95; *Herbert v. Webster*, 15 Ch. D. 610.

And, apparently, if the gift were directly to the grandchildren instead of through the direction to settle, the construction would be the same. *Greenwood v. Roberts*, 15 B. 92, which at first sight appears to decide the contrary, is explained by the M. R., in *Webster v. Boddington*, 26 B. 128, to have been decided on a different principle. Whether the principle was rightly applied, *quære*.

But if the share given to grandchildren is contingent upon events, which may happen beyond the limits of perpetuity, and the share may never become vested, in which event the shares taken by the other *stirpes* would be in-

creased, then the shares of each *stirps* would not be ascertainable within the proper limits, and the whole will fail; for instance, if the gift is to A. for life, then to the children of A., and the children of such children who attain twenty-one, the children to take a parent's share. *Webster v. Boddington*, 26 B. 128; *Seaman v. Wood*, 22 B. 591; *Smith v. Smith*, 5 Ch. 342; *Hale v. Hale*, 3 Ch. D. 643; *Bentinck v. Duke of Portland*, 7 Ch. D. 693; *Pearks v. Moseley*, 5 App. C. 714; see *Salmon v. Salmon*, 29 B. 27.

Gift to a person satisfying a particular description is void unless there must be some such person within the limits of perpetuity.

Where there is a gift to a person by some particular description, the gift will be void, unless it is clear that there must be some person answering the description within the limits of perpetuity. Thus, a trust to convey to such person as for the time being would take by descent as heir male of the body of the testator's grandson, when some such person should attain the age of twenty-one, is void. *Lord Dungannon v. Smith*, 12 Cl. & F. 546; *Ibbetson v. Ibbetson*, 10 Sim. 495; 5 M. & Cr. 26; *Wainman v. Field*, Kay, 507; *Patching v. Barnett*, 28 W. R. 886.

Effect of the words "as far as the rules of law and equity permit."

*Tollemache v. The Earl of Coventry*.

How far the words, "as far as the rules of law and equity permit," would restrain the gift to such persons as satisfy the description within the limits of perpetuity, seems not clearly settled.

Where there was a gift to the person who should from time to time be Lord Vere, it being the testator's will that the goods should be held with the title of the family, as far as the rules of law and equity permit, the gift was held void for perpetuity. But there the qualification was not in the original gift, and the trust not being executory, it may be said, the expression of what the testator meant to do was not sufficient to override his express words of gift. *Tollemache v. Earl of Coventry*, 2 Cl. & F. 611; 8 Bl. N. S. 547. See 12 Cl. & F. 555, *note*.

But in that case there seems to be the authority of V.-C. Leach, Lord Eldon, and Lord Lyndhurst, against that of

Lord Brougham, and *quære*, whether the decision is not wrong. See, too, *per* Lord St. Leonards, in *Ker v. Lord Dungannon*, 1 Dr. & War. 536; and see *Mackworth v. Hinaman*, 2 Kee. 658.

But it seems, a trust of chattels for the person or persons who should, for the time being, be in actual possession of certain settled estates, to the end that such chattels may go along with the same estates, "so far as the rules of law or equity will permit," but so that they shall not vest in any person becoming entitled to the estates for an estate of inheritance, unless he attain twenty-one, would be good, though in the absence of those words it would be bad. *Harrington v. Harrington*, L. R. 5 H. L. 87.

On the effect of the words, "as far as the law allows," see *Pownall v. Graham*, 33 B. 242.

Where personalty is given upon the trusts of real estate, which has been settled upon living persons for life, remainder to their sons in tail, and there is a direction that the personalty is not to vest in any tenant in tail who dies under twenty-one, the clause is not void for remoteness, but refers only to tenants in tail by purchase, since none but tenants in tail by purchase can be said to take personalty under the will, personalty not being descendible. *Christie v. Gosling*, L. R. 1 H. L. 279; *Martelli v. Holloway*, L. R. 5 H. L. 532.

Direction that personalty is not to vest in a tenant in tail dying under 21

In such a case, in the event of a tenant in tail by purchase dying under twenty-one, leaving issue, the realty and personalty would become severed, since the realty would go to the issue, and the personalty to the next tenant in tail by purchase. But if the disposition of the personal estate contains or involves any trust for a tenant in tail who takes real estate by descent, the term tenant in tail could not be limited to tenants in tail by purchase. See *per* Lord Westbury, 1 D. J. & S. 1; *Ibbetson v. Ibbetson*, 10 Sim. 495; 5 M. & Cr. 26; *Ferrand v. Wilson*, 4 Ha. 344.

Power exercised within the limits of perpetuity is good.

Distinction as regards perpetuity between general and special powers.

A power, though authorising an appointment which would be void for perpetuity, is valid if the appointment is kept within the proper limits. *Slark v. Dakyns*, 10 Ch. 35.

In the case of powers of appointment to particular classes of persons, and of general powers to appoint by will vested in a tenant for life, the person to whom the appointment is made must have been capable of taking under the instrument creating the power. *In re Powell's Trusts*, 39 L. J. Ch. 188.

Where the power is a general power to appoint by deed or will, the appointees need only be capable of taking under the instrument exercising the power.

Special power.

Thus, where a marriage settlement gave a power to appoint to children of the marriage, an appointment to a son for life, with remainder to such persons as he should by will appoint, was held void as to the remainder. *Wollaston v. King*, 8 Eq. 165; *In re Brown & Sibby*, 3 Ch. D. 156; *Hodgson v. Halford*, 11 Ch. D. 959.

So a power in a settlement to appoint to children cannot be exercised by an appointment to take effect upon the marriage of an unmarried child. *Morgan v. Gronow*, 16 Eq. 1.

Invalid restrictions rejected.

When a power is well executed, but a restraint upon anticipation is imposed upon the enjoyment, which is void for remoteness, the restraint will be rejected. *Fry v. Capper*, Kay, 163; *Teague's Settlement*, 10 Eq. 564; *Cunynghame's Settlement*, 11 Eq. 324; see *ante*, p. 431.

And when there is an absolute gift, subsequent qualifications of the gift which are void for remoteness will be rejected. *Carver v. Bowles*, 2 R. & M. 306; *Ring v. Hardwick*, 2 B. 352.



## THE CY PRÈS DOCTRINE.

In many cases limitations of real estate, in themselves void for perpetuity, have been made good by the application of the so-called doctrine of *cy près*.

This doctrine is a rule of construction, and applies not merely to executory trusts. *Monypenny v. Dering*, 16 M. & W. 418; *Parfitt v. Hember*, 4 Eq. 443; *Hampton v. Holman*, 5 Ch. D. 183. Cy près doctrine is a rule of construction.

It also applies to the execution of a power by will. *Line v. Hall*, 43 L. J. Ch. 107.

1. Where a testator has devised lands in a manner transgressing the limits of perpetuity, and the Court can, by giving estates tail to any of the devisees, carry the property in the precise course marked out by the testator, supposing the estates left to themselves, it will do so. *Humberston v. Humberston*, 1 P. Wms. 332; *Monypenny v. Dering*, 16 M. & W. 418; *Parfitt v. Hember*, 4 Eq. 443. Parent will take an estate tail where the effect will be to give the property in the course marked out by the testator.

Thus a limitation to an unborn person for life, remainder to his children successively in tail, will give the unborn person an estate tail; cases *supra*.

And the doctrine may be applied to some of a class, and not to others; as well as to a portion of the property included in a devise, and not to the rest. *Vanderplank v. King*, 3 Ha. 1; *Line v. Hall*, 22 W. R. 124; 43 L. J. Ch. 107. Doctrine applied to some members of a class and to part of the property devised.

2. And where, by giving an estate tail to the parent, all the objects intended to be benefited by the testator would be included, this construction will be adopted, although the children were meant to take jointly in tail as purchasers. *Pitt v. Jackson*, 2 B. C. C. 51, cit. 2 Ves. jun. 349; *Vanderplank v. King*, 3 Ha. 1; *Williams v. Teale*, 6 ib. 239. The doctrine applies though the children meant to take jointly in tail.

3. The doctrine will, however, not be applied where the result would be to carry the estate to persons not intended Limits of the doctrine.

to be benefited by the testator. *Monypenny v. Dering*, 16 M. & W. 418; 7 Ha. 568; 2 D. M. & G. 174.

Whether  
it applies  
where the  
intention  
is to create  
life estates  
for ever.

4. It has sometimes been said that the *cy près* doctrine does not apply where the only intention is to create successive life estates for ever, but the point is not covered by authority. It is clear that the doctrine will not apply where the intention is only to create a limited number of life estates on the principle already stated. *Seaward v. Willock*, 5 East, 198.

Nor will it apply where successive terms of years, determinable on the death of the devisee, are given. *Somerville v. Lethbridge*, 6 T. R. 213; *Beard v. Westcott*, 5 B. & Ald. 81; T. & R. 25.

On the other hand, it is clear that where an estate tail is given by the force of the limitation itself, words indicating that the successive interests are to be for life will be rejected, whether the estate tail is given by direct words: *Doe d. Elton v. Stenlake*, 12 East, 515; *Reece v. Steel*, 2 Sim. 233; *Hugo v. Williams*, 14 Eq. 225; *Forsbrook v. Forsbrook*, 3 Ch. 93; or by the effect of a gift over in default of issue: *Mortimer v. West*, 2 Sim. 274; *Woollen v. Andrews*, 2 Bing. 126; *Brooke v. Turner*, 2 Bing. N. C. 422; *Parfitt v. Hember*, 4 Eq. 443.

On the whole, there seems to be no reason why the same construction should not apply where the testator attempts to create life estates for ever. See *per* Sir J. Rolt, in *Forsbrook v. Forsbrook*, 3 Ch. p. 99, and *Parfitt v. Hember*, 4 Eq. 443, where no stress was laid on the gift in default of issue. And on this ground only *Woollen v. Andrews* and *Mortimer v. West*, where the gift over was not on an indefinite failure of issue, can be held satisfactory. See *Hampton v. Holman*, 5 Ch. D. 183.

It does not  
apply  
where the  
children  
take in fee.

5. The *cy près* construction does not apply where the estates are limited to children of unborn persons in fee. *Bris-tow v. Warde*, 2 Ves. jun. 336; *Hale v. Pew*, 25 B. 335.

The doctrine does not apply to personalty nor to a mixed fund. *Routledge v. Dorril*, 2 Ves. jun. 365; *Boughton v. James*, 1 Coll. 44; 1 H. L. 406. It does not apply to personalty

Where a parent having power to appoint to sons in tail appoints to them for life with remainders in tail, and puts them to their election between benefits given by the will and their rights in default of appointment, the doctrine of *cy près* has no application. *In re Denneby's Estate*, 17 Ir. Ch. 97.

### ACCUMULATION.

A trust for accumulation beyond the limits of perpetuity is entirely void *ab initio*, whether before or since the Thellusson Act, and whether it be for a purpose excepted from the operation of the Act or not, unless it be for the payment of debts. *Curtis v. Lukin*, 5 B. 147; *Scarbrick v. Skelmersdale*, 17 Sim. 187. Trust for accumulation beyond the limits of perpetuity is void *in toto*.

And by the Thellusson Act, 39 & 40 Geo. III. c. 98, accumulation by will is restrained for any longer term than twenty-one years from the death of the testator, or during the minority or respective minorities of any person or persons who shall be living or *en ventre sa mère* at the death of the testator, or during the minority or respective minorities only of any person or persons who, under the trusts of the will, would for the time being, if of full age, be entitled to the rents and profits or the interest directed to be accumulated. The Thellusson Act.

By section 2 provisions for the payment of the debts of the devisor or other person or persons, and provisions for raising portions of the children of the devisor, or of any person taking any interest under the will, and directions touching the produce of timber or wood, are excepted from the Act.

An express direction to accumulate is not necessary to The statute ap-

plies if property is so given as to involve accumulation.

bring the property within the statute; it is enough if the property is given in such a manner that accumulation becomes necessary. *Tench v. Cheese*, 6 D. M. & G. 453; *Macdonald v. Bryce*, 2 Kee. 276; the decree in *Countess of Bective v. Hodgson*, 10 H. L. 656; *Wade Gery v. Handley*, 1 Ch. D. 653; 3 Ch. D. 374.

Accumulation by trustees of money to be laid out at once is not within the statute.

But when property is directed to be applied to certain purposes at once, but is accumulated owing to the neglect of trustees, or from some other reason, the statute does not apply. *Lombe v. Stoughton*, 12 Sim. 304; where the direction to accumulate was merely subsidiary to the general trusts. See *Phipps v. Kelynge*, 2 V. & B. 57.

Direction to keep up policies is not within the statute.

A direction to keep up policies effected by the testator in his lifetime on the lives of his children, the policies to be settled in case of marriage on their wives and children, is not a trust for accumulation within the statute. *Bassil v. Lester*, 9 Ha. 177.

Testator may select any one period permitted by the statute for accumulation. Period of 21 years runs from the death.

A testator may direct accumulation during any one, but not more, of the periods allowed by the statute. *Wilson v. Wilson*, 1 Sim. N. S. 288.

The period of twenty-one years is to be calculated from the death of the testator, exclusive of the day of his death, and must be a period immediately following his death. *Webb v. Webb*, 2 B. 493; *Gorst v. Lowndes*, 11 Sim. 434; *Shaw v. Rhodes*, 1 M. & Cr. 154; *A.-G. v. Poulden*, 3 Ha. 555.

Period of the minority of any person.

The words of the statute permitting accumulation during the minority of any person who, under the trusts of the will, would, if of full age, be entitled to the rents and profits, do not permit accumulation during the period before the birth of such person. *Haley v. Bannister*, 4 Mad. 275; *Ellis v. Maxwell*, 3 B. 596.

And it has been doubted, whether these words would authorise an accumulation during the minority of a person not born at the date of the will, but if not, they are super-

fluous. *Bryan v. Collins*, 15 B. 17; see *Peard v. Keekewick*, 15 B. 166.

Accumulation directed within the limits of perpetuity, but beyond the limits of the statute, is void only beyond such limits. *Longdon v. Simson*, 12 Ves. 295; *Griffiths v. Vere*, 9 Ves. 127.

Accumulation directed for periods longer than the statute allows is void only for the excess.

Where there is a direction to accumulate income with a discretionary power to apply any part of the income towards the maintenance of infants, the power of maintenance continues after the period for accumulation limited by the Thellusson Act has expired. *Pride v. Fooks*, 2 B. 430.

An accumulation for the purpose of paying debts, whether of the testator or other persons, is excepted from the Act, and is good, whether the debts be existing or future debts. *Varlo v. Faden*, 27 B. 255; 1 D. F. & J. 211; and see *Barrington v. Liddell*, 2 D. M. & G. 505.

Accumulation for payment of debts is excepted from the statute.

But the payment of debts must be *bond fide* and the primary object of the accumulation, and therefore if debts are only directed to be paid upon certain contingencies, and incidentally, the case is not within the exception. *Mathews v. Keble*, 4 Eq. 467; 3 Ch. 691.

A direction for payment of debts out of the annual income does not affect the rights of creditors, and if the debts are in fact paid out of *corpus* accumulation cannot go on for the purpose of recouping the *corpus*. *Tewart v. Lawson*, 18 Eq. 490.

And it seems an express direction to accumulate for the purpose of recouping *corpus* would be void. *Ib.*

The second exception is of portions for the children of the testator, or any person taking any interest under the will.

What are portions within the exception.

The children must be children either of the testator or of a person taking an interest under the will, and therefore if the accumulations are given to a class of children,

some of whose parents take nothing under the will, the exception does not apply. *Eyre v. Marsden*, 2 Kee. 564.

But the interest taken by the parent under the will need not be an interest in the fund to be accumulated. *Burt v. Sturt*, 10 Ha. 423; *Barrington v. Liddell*, 2 D. M. & G. 500.

And any interest, however small, given to the parent is sufficient. *Barrington v. Liddell*, 2 D. M. & G. 505; *Evans v. Hillier*, 5 Cl. & F. 126.

A fund to be accumulated and given to children living at the period of distribution is not a portion.

As to what are portions within the exception :

A fund to be accumulated and given to such children as may be living at the time when the accumulations are to cease, is not within the exception. *Burt v. Sturt*, 10 Ha. 415; *Drewett v. Pollard*, 27 B. 196.

Nor are accumulations to be added to capital and given to a child or to the members of a family. *Edwards v. Tuck*, 3 D. M. & G. 40; *Morgan v. Morgan*, 4 De G. & S. 175; 20 L. J. Ch. 441; *Wildes v. Davies*, 1 Sm. & G. 475; *Bourne v. Buckton*, 2 Sim. N. S. 91; *Jones v. Maggs*, 9 Ha. 605; *Mathews v. Keble*, 4 Eq. 467; 3 Ch. 691.

Nor is a fund directed to be accumulated and given to a parent for life with remainder to her children. *Watt v. Wood*, 2 Dr. & Sm. 56. *Middleton v. Losh*, 1 Sm. & G. 61, seems irreconcilable with the other decisions, unless it can be supported on the ground that the provision was called a portion; see 10 Ha. 426.

Accumulation to pay portions charged by another instrument. Portions given by the will itself.

But a direction to accumulate a sum to pay portions charged by another instrument is within the exception. *Halford v. Stains*, 16 Sim. 488; *Barrington v. Liddell*, 2 D. M. & G. 505.

And the exception extends also to portions created by the will itself. *Beech v. Lord St. Vincent*, 3 De G. & S. 678; 3 Jur. N. S. 762.

And when an accumulation is directed to raise portions for children if there are any, and if not for some other purpose, the case is within the exception only in the former event. *Re Clulow's Trust*, 1 J. & H. 639.

When there is an indefeasible gift, the legatee has a right to his property at twenty-one, and a direction to accumulate will only be valid till then; and this will be the case, it would seem, even though the direction to accumulate may be for a period exceeding the limits of the statute. *Gosling v. Gosling*, Johns. 265; *Coventry v. Coventry*, 2 Dr. & S. 470; *Phillips v. Phillips*, W. N. 1877, 260. Legatee having a vested right may stop accumulation when he attains 21.

This principle, however, does not apply where the legatees are charities. *Harbin v. Masterman*, 12 Eq. 559. Case of Charities.

Where a fund is given upon trust to pay certain annuities out of the income and to accumulate the rest, and the fund and accumulations are given after the death of the annuitants to a legatee absolutely, the legatee is not entitled to stop the accumulations during the lives of the annuitants, and to ask for payment of the fund after providing for the annuities. So far as the accumulation extends beyond the statutory period the income is undisposed of and goes to the heir-at-law or next of kin. *Talbot v. Jevers*, 20 Eq. 255; *Weatherall v. Thornburgh*, 8 Ch. D. 261. Statute does not accelerate interests in remainder.

When property is given absolutely in the first place, and a direction is afterwards added to accumulate, the accumulations, so far as they are void by the statute, go to the person to whom the absolute interest is given. *Trickey v. Trickey*, 3 M. & K. 560; *Combe v. Hughes*, 34 B. 127; 2 D. J. & S. 657. Destination of excessive accumulation.

And where an estate is devised subject to a trust for accumulation which is void, the trust sinks for the benefit

of the persons for the time being entitled to the estates. *Evans v. Hellier*, 1 M. & Cr. 135; 5 Cl. & F. 114; *Re Clulow's Trust*, 1 J. & H. 639.

But the effect of the statute is not to accelerate any gifts in the will. *Green v. Gascoyne*, 4 D. J. & S. 565.

Accumulations released by the statute pass to the heir or next of kin, as the case may be, or to the residuary legatees if there is one.

Therefore accumulations released by the statute, if the fund to be accumulated is not a residue, in the case of personalty, go to form part of the capital of the residue: *Ellis v. Maxwell*, 3 B. 587; *A.-G. v. Poulden*, 3 Ha. 555; *Jones v. Maggs*, 9 Ha. 605; *Crawley v. Crawley*, 7 Sim. 427.

In the case of realty the residuary devisee or heir is entitled according as the will is governed by the Wills Act or not. *Nettleton v. Stephenson*, 3 De G. & S. 366.

Accumulations of residue.

If the fund to be accumulated is residuary, the void accumulations go to the heir or next of kin, according to the nature of the property, and if the fund is mixed, to the heir and next of kin proportionately. *Green v. Gascoyne*, 4 D. J. & S. 565; *Halford v. Stains*, 16 Sim. 488; *Eyre v. Marsden*, 2 Kee. 564; 4 M. & Cr. 431; *Wildes v. Davies*, 1 Sm. & G. 475; *Ralph v. Carrick*, 5 Ch. D. 984; 11 Ch. D. 873; see *Elborne v. Goode*, 14 Sim. 165.

The income of accumulations forms part of the capital of the residue.

It seems that the income of accumulations not being a residue belongs to the tenant for life of the residue as income, and does not form part of the capital of the residue. *In re Phillips*; *Phillips v. Levy*, 49 L. J. Ch. 198; 28 W. R. 340; see, however, *Crawley v. Crawley*, 7 Sim. 427.

Income of accumulations of rents and profits retains its character of realty. *Eyre v. Marsden*, 2 Kee. 577.

When there is a contingent gift to A. with accumulation in the meantime, and the gift is given over to B. if the contingency does not happen, B., upon taking an indefeasible interest, is entitled to the accumulations within



twenty-one years from the testator's death, together with the income of those accumulations. *Morgan v. Morgan*, 20 L. J. Ch. 111, 441; 15 Jur. 319; but see *Bryan v. Collins*, 16 B. 14.

## CHAPTER XXXV.

## CONDITIONS SUBSEQUENT.

**Conditions subsequent impossible, impolitic, or illegal, are ineffectual,** IN the case of conditions subsequent, if the condition is impossible, impolitic, or illegal, the gift remains, at any rate, where there is no gift over. *Thomas v. Howell*, 1 Salk. 170; *Walker v. Walker*, 2 D. F. & J. 255; *Wilkinson v. Wilkinson*, 12 Eq. 604.

**whether there is a gift over or not.**

And it seems, even where there is a gift over, but the performance of the condition has become impossible, the previous gift remains. *Graydon v. Hicks*, 2 Atk. 16; *Jones v. Suffolk*, 1 B. C. C. 528; *Collett v. Collett*, 35 B. 312; *Sutcliffe v. Richardson*, 13 Eq. 606; and see *Wedgwood v. Denton*, 12 Eq. 290.

In most of these cases, however, the condition, being marriage with consent, became, by the death of the person, whose consent was required, a condition in general restraint of marriage. See, too, *Yates v. University of London*, L. R. 7 H. L. 438.

A condition forfeiting a legacy in the event of the legatee marrying a certain person without the testator's consent has been limited to a marriage in the testator's lifetime. *Booth v. Meyer*, 38 L. T. N. S. 125.

**Condition requiring marriage with consent of several persons becomes impossible**

A condition subsequent requiring the consent of several persons becomes impossible and is discharged by the death of all, or even of one of them, though in the latter case it would seem the condition is satisfied by the consent of the survivors. *Peyton v. Bury*, 2 P. W. 625; *Grant v. Dyer*, 2 Dow. 73; *Jones v. Suffolk*, 1 B. C. C.

528 ; *Aislaby v. Rice*, 3 Mad. 256 ; see *Dawson v. Oliver* by death of some.  
*Massey*, 2 Ch. D. 753.

A condition subsequent not performed owing to the Condition not performed through ignorance works a forfeiture, where the property is given over, whether in the case of personalty or of realty. *Hodges' Trusts*, 16 Eq. 92 ; *Porter v. Fry*, 1 Vent. 197 ; *Astley v. Earl of Essex*, 18 Eq. 290. takes effect,

But this does not apply, where the devisee is the heir unless the devisee is who has a title independent of the will. *Doe d. Kenrick*, v. *Lord Beauclerk*, 11 East, 667 ; *Doe d. Taylor v. Crisp*, 8 Ad. & E. 778 ; *Murphy v. Lineham*, 1 R. 9 C. L. 123.

So, when there is a clause forfeiting a legacy, if not Condition forfeiting a legacy if the legacy is not claimed, though the legatee received no notice of the legacy or of the death of the testator. *Burgess v. Robinson*, 3 Mer. 7 ; *Tulk v. Houlditch*, 1 V. & B. 248 ; *Powell v. Rawle*, 18 Eq. 243. not claimed.

But the filing of a bill for the administration of the estate before the time appointed is equivalent to a claim What amounts to a claim. by the legatees, though they may not be parties to the suit. *Tollner v. Marriott*, 4 Sim. 19.

In the case of realty a valid condition subsequent is A condition is effectual even where there is no gift over. *Cooke v. Turner*, 15 M. & W. 727 ; 14 Sim. 493 ; 15 Sim. 611 ; 16 Sim. 482 ; and see *Evanturel v. Evanturel*, L. R. 6 P. C. 1. without a gift over in the case of realty.

In *Cooke v. Turner* there was a gift over, but the case seems to have been decided at common law independently of the gift over.

And a condition subsequent may operate to destroy a contingent, as well as to divest a vested estate. *Egerton v. Earl Brownlow*, 4 H. L. 1.

With regard to personalty, a condition subsequent is Personalty

follows the rule as modified by the doctrine of *in terrorem*. effectual without a gift over, except as far as the rules of the civil law have been adopted with regard to certain classes of conditions, see *post*, p. 454. *Dickson's Trust*, 1 Sim. N. S. 37; *Craven v. Brady*, 4 Eq. 209; 4 Ch. 296.

Test of validity of a condition.

As to what conditions are valid, it has been said, that nothing can be made the subject of a condition in a will, which could not be made the subject of a contract or wager in life. See *per* the Lord Chief Baron, *Egerton v. Earl of Brownlow*, 4 H. L. 1, p. 150.

Condition of residence must be clearly defined.

Perhaps no general rule can safely be laid down; but, independently of the question whether a condition involves anything illegal or impolitic, in order that it may be effectual the meaning of the testator must be reasonably clear and precise; and, therefore, conditions to reside in a certain house, and to educate children in England, have been held too uncertain to work a forfeiture. *Fillingham v. Bromley*, T. & R. 530; *Clavering v. Ellison*, 3 Dr. 451; 7 H. L. 707.

A gift over in the event of a change of religion by the legatee is valid. *Hodgson v. Halford*, 11 Ch. D. 959.

Conditions decreasing an annuity if the annuitant again lives with her husband, or increasing a legacy to a husband in the event of a separation from his wife, are invalid. *Bean v. Griffiths*, 19 Jur. 1045; *Cartwright v. Cartwright*, 3 D. M. & G. 982.

Condition not to dispute a will.

A condition not to dispute a will is valid in law if the will is unsuccessfully disputed, though it will not avail to make an invalid disposition good. *Cooke v. Turner*, 15 M. & W. 727; *Evanturel v. Evanturel*, L. R. 6 P. C. 1; *Stevenson v. Abingdon*, 11 W. R. 935; see *Warbrick v. Varley*, 30 B. 347; *Hope v. International Financial Society*, 4 Ch. D. 327; *Phillips v. Phillips*, W. N. 1877, 260.

On the other hand, a condition not to institute legal proceedings touching the estate and effects devised, is to

general, and is bad. *Rhodes v. Muswell Hill Land Co.*, 29 B. 561.

A condition that trustees shall not pay over the shares of legatees without taking from them bonds that they will not intermarry or illegally cohabit with certain persons will not be enforced. *Poole v. Bott*, 11 Ha. 33.

### CONDITIONS IN RESTRAINT OF MARRIAGE.

A condition in restraint of marriage applies only to a lawful marriage. *In re M'Laughlin*, 1 L. R. Ir. 42.

A condition subsequent in restraint of marriage, where the estates are for life or in fee, is, it seems, valid as regards realty. *Jones v. Jones*, 1 Q. B. D. 279; *Bellairs v. Bellairs*, 18 Eq. 510.

But such a condition is void, if imposed upon a tenant in tail, as repugnant to the estate. *Earl of Arundel's Case*, 3 Dyer, 342 b.

It is clear, that in the case of personalty a condition subsequent in general restraint of marriage is void. *Morley v. Rennoldson*, 2 Ha. 570.

And the same rule applies to a mixed fund arising from the proceeds of sale of realty and pure personalty. *Lloyd v. Lloyd*, 2 Sim. N. S. 255; *Bellairs v. Bellairs*, 19 Eq. 510.

It would seem that the rule applies to real and personal estate given together. *Duddy v. Gresham*, 2 L. R. Ir. 443.

And it seems, that a legacy out of the proceeds of land directed by the testator to be converted would follow the same rule. See *Hart's Trusts*, 3 De G. & J. 195; *Bellairs v. Bellairs*, *supra*.

On the other hand, a limitation to a person till marriage is good, the intention being to provide for the person while he remains unmarried, and not to prevent him from marry-

Condition subsequent in restraint of marriage is good in realty.

But not as regards an estate tail.

Condition in restraint of marriage is void in personalty. Mixed fund.

Legacy out of proceeds of sale of land.

Limitation till marriage is good.

ing. *Potter v. Richards*, 24 L. J. Ch. 488; *Heath v. Lewis*, 3 D. M. & G. 954.

Conditions  
in partial  
restraint of  
marriage  
are good  
though  
they may  
be ineffec-  
tual.

And conditions in partial restraint of marriage are valid, both with regard to realty and personalty, though with regard to the latter the further question arises whether they are *in terrorem* or not.

Thus, conditions restraining a widow or widower from marrying again, whether it be the widow of the testator or of a stranger: *Evans v. Rosser*, 2 H. & M. 190; *Newton v. Marsden*, 2 J. & H. 356; *Allen v. Jackson*, 1 Ch. D. 399; or requiring a marriage with consent: *Sutton v. Jewks*, 2 Ch. Rep. 95; or restraining marriage before a certain age: *Stackpole v. Beaumont*, 3 Ves. 89, are good as conditions, though they may be ineffectual if there is no gift over, on the principle hereafter mentioned.

So conditions against marriage with a Scotchman, or in a manner not in accordance with the rules of the Quakers, or with a person of a particular religion, or a domestic servant, are valid. *Perrin v. Lyon*, 9 East, 170; *Haughton v. Haughton*, 1 Moll. 611; *Duggan v. Kelly*, 10 Ir. Eq. 295, 473; *Hodgson v. Halford*, 11 Ch. D. 959; *Jenner v. Turner*, 50 L. J. Ch. 161; 29 W. R. 99.

In the case of real estate such a condition is valid even if there is no gift over. *Haughton v. Haughton*, 1 Moll. 611.

Doctrine  
of *in*  
*terrorem*.

In the case of personalty, certain conditions subsequent, though good in law, are, in accordance with the rule of the Civil Law, held to be void, and *in terrorem* merely, if there is no gift over.

It seems the doctrine that certain conditions are *in terrorem* merely applies to real estate when it is included with personalty in the same gift. *Duddy v. Gresham*, 2 L. R. Ir. 443.

Of this nature are the conditions in partial restraint of marriage already mentioned. *Marples v. Bainbridge*, 1

Mad. 590; *Reynish v. Martin*, 3 Atk. 330; *Wheeler v. Bingham*, 1 Wils. 135; 3 Atk. 364; *W. v. B.*, 11 B. 621.

And the same rule applies to a condition not to contest the will. *Powell v. Morgan*, 2 Vern. 90.

But if there is a gift over, these conditions are effectual, the gift over being considered sufficient evidence, that they were not meant to be *in terrorem* merely. *Cleaver v. Spurling*, 2 P. Wms. 526; *Tricker v. Kingsbury*, 7 W. R. 652; *Charlton v. Coombes*, 11 W. R. 1038; *Craven v. Brady*, 4 Eq. 209; 4 Ch. 296.

On the question whether the doctrine of *in terrorem* applies to conditions precedent, the cases show:

Whether  
the doc-  
trine ap-  
plies to  
conditions  
precedent.

1. A condition precedent, requiring consent to marriage generally, without limitation of age, is effectual if there is a gift over. *Malcolm v. O'Callaghan*, 2 Mad. 349; *Gardiner v. Slater*, 25 B. 509.

2. The gift of a smaller sum, in the event of marriage without consent, has the same effect. *Creagh v. Wilson*, 2 Vern. 572; *Gillett v. Wray*, 1 P. Wms. 284.

3. A condition precedent, requiring consent to marriage if under a certain age, is good if there is no gift over. *Stackpole v. Beaumont*, 3 Ves. 89.

4. A condition precedent not to marry under a certain age is good, though there is no gift over. *Yonge v. Furze*, 8 D. M. & G. 756.

5. A gift to a legatee, if he marries a particular person, only takes effect in that event. *Davis v. Angel*, 4 D. F. & J. 524. *Quære* whether *Smith v. Cowdery*, 2 S. & St. 358, is overruled.

6. But it seems a condition precedent requiring marriage with consent generally, and without a gift over, would be considered *in terrorem* merely. *Reeves v. Herne*, 5 Vin. Ab. 343, pl. 41; *Reynish v. Martin*, 3 Atk. 330; see *Clarke v. Parker*, 19 Ves. 1.

In cases under 4 and 5 the conditions can only be Waiver of

conditions by the testator. waived testamentarily, and no consent of the testator to a marriage in his lifetime, not within the condition, will make the gift good.

Consent of the testator to a marriage in his lifetime satisfies a condition requiring consent. But where the condition is marriage with consent, whether precedent or subsequent, the consent of the testator to a marriage in his lifetime satisfies the condition. *Clarke v. Berkeley*, 2 Vern. 720; *Parnell v. Lyon*, 1 V. & B. 479; *Wheeler v. Warner*, 1 S. & St. 304; *Tweeddale v. Tweeddale*, 7 Ch. D. 633; see *Violett v. Brookman*, 5 W. R. 342.

And the condition does not apply to a subsequent marriage. *Hutcheson v. Hammond*, 3 B. C. C. 128; *Crommelin v. Crommelin*, 3 Ves. 227.

Consent of testator to a marriage to take place after his death. But in such a case the consent of a testator to a marriage to take place after his death does not obviate the necessity for the consent of the persons named in the will. *Lowry v. Pattison*, 1 R. 8 Eq. 372.

And, where the gift is till marriage, the consent of the testator to a marriage does not extend the gift. *Bullock v. Bennett*, 7 D. M. & G. 283; see *Cooper v. Cooper*, 6 Ir. Ch. 217.

Condition of marriage with consent is satisfied by a second marriage with consent. It seems, that where there is a gift upon marriage with consent, the legatee has her whole life to perform the condition, and the legacy is not forfeited by a first marriage without consent. *Randall v. Payne*, 1 B. C. C. 55; *Beaumont v. Squire*, 17 Q. B. 905. *Clifford v. Beaumont*, 4 Russ. 325, was decided on the ground, that the gift was only upon a marriage with consent, which had not in fact been obtained. See, too, *Duddy v. Gresham*, 2 L. R. I. 443.

But if other provision is made for the legatee in the event of marriage without consent, the condition must be limited to a first marriage. *Lowe v. Manners*, 5 B. & Ald. 917.

Condition In the case of a condition requiring the consent of



several persons, if the consent required is that of executors or trustees, the consent of those who renounce or do not act is not necessary. *Worthington v. Evans*, 1 S. & St. 165; *Boyce v. Corbally*, Ll. & G. temp. Plunkett, 102; *Ewens v. Addison*, 4 Jur. N. S. 1034; *White v. M'Dermot*, I. R. 7 C. L. 1; see *Clarke v. Parker*, 19 Ves. 1.

requiring  
the con-  
sent of  
several  
persons  
how per-  
formed.

But if there is only a single executor who renounces, his consent must, it seems, be obtained. *Graydon v. Hicks*, 2 Atk. 16; but the case is doubtful.

And a condition requiring the consent of several persons is performed by obtaining the consent of the survivors. *Ewing v. Anderson*, 7 W. R. 23; *Dawson v. Oliver Massey*, 2 Ch. D. 753.

Where a testator directs, that if a certain sum should be applied in favour of A., A. should apply a sum of different amount in favour of B., the condition will be compulsory on A. only if the whole of the sum in question is applied in his favour, and the condition will not be apportioned. *Caldwell v. Cresswell*, 6 Ch. 279; *Fazakerley v. Ford*, 4 Sim. 390.

Apportion-  
ment of  
condition.

A condition in a will must be performed according to its terms, and the Court has no power to relieve the legatee from any of them. Thus a right of pre-emption given to a person, if he pays a sum of money within a given time, followed by a disposition of the property if the money is not paid within the time, must be strictly complied with. *Brooke v. Garrod*, 3 K. & J. 608; 2 De G. & J. 62; *Austin v. Tawney*, 2 Ch. 143; see *Evans v. Stratford*, 10 L. J. N. S. 713.

Right of  
pre-emp-  
tion.

A right of pre-emption at a fixed price is not destroyed by a compulsory purchase under the Lands Clauses Act, and the person to whom the right is given may take the purchase money paid by the company less the fixed price. *Re Cant's Estate*, 4 De G. & J. 503.

Trustees directed to give a particular person a right of

pre-emption at a fixed price are, it seems, not bound to make a good title, and ought not to incur costs in so doing. *In re Davison & Torrens*, 17 Ir. Ch. 7.

**Condition requiring a release.** Similarly, a condition requiring a release within a given time, with a gift over, if the release is not given within the time, must be literally complied with. *Simpson v. Vickers*, 14 Ves. 341, 348.

But if there is no gift over, a release given within a reasonable time will satisfy the condition. *Simpson v. Vickers*, 14 Ves. 341; *Taylor v. Topham*, 1 B. C. C. 168; *Paine v. Hyde*, 4 B. 468; *Hollinrake v. Lister*, 1 Russ. 506; see *Scarlett v. Lord Abinger*, 34 B. 338; *Ledward v. Hassels*, 2 K. & J. 370.

A legacy given on condition of conveying real estate to a third person gives a legatee who has conveyed no lien upon the land for the legacy. *Barker v. Barker*, 10 Eq. 438.

**Performance of conditions.** As to the performance of conditions to take a particular name, see a valuable note in Davidson's Prec., vol. iii. 356, to which add *D'Eyncourt v. Gregory*, 1 Ch. D. 441.

As to conditions of residence, see *Wynne v. Fletcher*, 24 B. 430; *Walcot v. Botfield*, Kay, 534; *Clavering v. Ellison*, 7 H. L. 707, and cases there cited; *Parry v. Roberts*, 19 W. R. 378; *Dunne v. Dunne*, 3 Sm. & G. 22; 7 D. M. & G. 207.

### REPUGNANT CONDITIONS.

Conditions repugnant to the estate previously given are void.

**Restraints upon alienation.** Thus, conditions in general restraint of alienation are bad, if absolute interests have been given in the first place.

**Unlimited restraint.** 1. Where there is a devise in fee, followed by an absolute

restraint upon alienation, the restraint is void for repugnancy. Litt. 222 b. sec. 630; *Hood v. Oglander*, 35 B. 525.

But a limited restriction upon alienation is good.

Limited  
restraint.

Thus, a condition not to sell except to a certain class of persons is good. Litt. 223 a. sec. 361; *Doe d. Gill v. Pearson*, 6 East, 173; *Re Macleay*, 20 Eq. 186; see *Ludlow v. Bunbury*, 35 B. 36; *Billing v. Welch*, I. R. 6 C. L. 88.

But a condition not to sell except to one person is bad, since a person might be selected who would be certain not to purchase. *Muschamp v. Bluett*, Bridg. 137; *Attwater v. Attwater*, 18 B. 330.

In the same way, conditions restraining alienation by any particular form of conveyance, as by charge or mortgage, are bad. *Willis v. Hiscox*, 4 M. & Cr. 201; *Ware v. Cann*, 10 B. & Cr. 433.

Alienation  
by particular  
form of conveyance.

Thus, a gift over of so much land as an absolute owner charges or incumbers, would be bad. *Willis v. Hiscox*, *supra*.

Directions that the rents upon property devised are not to be raised have been held invalid. *A.-G. v. Catherine Hall*, Jac. 395; *A.-G. v. Greenhill*, 33 B. 193.

Direction  
not to raise  
rents.

These rules apply to personalty, so that if an absolute interest is given, a gift over if the legatee disposes of his interest is void. *Bradley v. Peixoto*, 3 Ves. 324; *In re Jones's Will*, 23 L. T. N. S. 211.

Gift over  
of personalty  
on alienation.

And a gift over upon alienation by a tenant for life with a power of disposition by deed or will is invalid. *Re Wolstenholme*; *Marshall v. Aizlewood*, 43 L. T. N. S. 752.

A restraint upon alienation limited in time not followed by a gift over is ineffectual. *Renaud v. Tourangeau*, L. R. 2 P. C. 4.

Possibly a gift over upon alienation before a certain

Gift over

on alienation before certain period.

time not having reference to the period of possession would be valid. See *Large's Case*, 2 Leon. 82; 2 Jarm. 17. *Churchill v. Marks*, 1 Coll. 445; see *Kiallmark v. Kiallmark*, 26 L. J. Ch. 1.

Gift over on alienation before period of distribution.

It is however clear that absolute interests may be given over upon alienation before the period of possession. *Kearsley v. Woodcock*, 3 Ha. 185; *Re Payne*, 25 B. 556; *Pearson v. Dolman*, 3 Eq. 315.

Gift over if legatee dies intestate.

2. A gift over, if the devisee or legatee does not dispose of his interest or dies intestate, is void both as regards realty and personalty. *Holmes v. Godson*, 2 Jur. N. S. 383; 25 L. J. Ch. 317; *Barton v. Barton*, 3 K. & J. 512; *Lightbourne v. Gill*, 3 B. P. C. 250; *Re Mortlock's Trusts*, 3 K. & J. 456; *Re Yalden*, 1 D. M. & G. 53; *Watkins v. Williams*, 3 Mac. & G. 622; *Henderson v. Cross*, 29 B. 216; *Perry v. Merritt*, 18 Eq. 152; *In re Wilcock's Settlement*, 1 Ch. D. 229.

So a direction following a devise to tenants in common in fee that if no distribution should be made during the lives of the tenants in common the property should devolve to their children is invalid. *Shaw v. Ford*, 7 Ch. D. 669.

Such conditional gifts over are good according to Scotch law. *Barstow v. Pattison*, L. R. 1 H. L. Sc. 392.

It has been held that a gift over if the legatee does not dispose of his interest does not become valid by his death in the testator's lifetime. *Hughes v. Ellis*, 20 B. 193; *Greated v. Greated*, 26 B. 621; but these cases were doubted in *In re Stringer's Estate*; *Shaw v. Jones Ford*, 6 Ch. D. 1.

3. A gift over in the event of a previous gift being void at law or in equity is good. *De Themmines v. De Bonneval*, 5 Russ. 288.

4. A tenant in tail cannot by condition subsequent be prevented from barring his estate tail. *Dawkins v. Lord Penrhyn*, 4 App. C. 51.

A condition intended to determine an estate tail in part only, for instance, a clause directing that the interests of tenants in tail shall cease as concerns the rights and interests of the person making default, but not farther or otherwise, is void. *Seymour v. Vernon*, 10 Jur. N. S. 487; 12 W. R. 729.

Condition determining an estate tail in part.

A condition in certain events determining estates tail, as if the tenant in tail were dead, will be made good by supplying the words dead without issue. *Astley v. Earl of Essex*, 18 Eq. 290.

Estate tail to cease as if the tenant in tail were dead.

But, if an absolute interest has been given, such a condition will be ineffectual, since the legatee's interest would not determine with his death, and, therefore, the interest directed to cease is not the exact interest previously given. *Bird v. Johnson*, 18 Jur. 976; *Catt's Trusts*, 2 H. & M. 46; 33 L. J. Ch. 495.

Absolute interest directed to cease as if the donee were dead.

5. So, too, when vested interests have once been given, restrictions postponing the enjoyment of the property beyond the age of twenty-one are void, unless the property is otherwise disposed of in the meantime. *Saunders v. Vautier*, Cr. & Ph. 240; *Rocke v. Rocke*, 9 B. 66; *Re Young's Settlement*, 18 B. 199; *Gosling v. Gosling*, Johns. 265.

Conditions postponing enjoyment beyond 21.

6. In the same way life interests must, as long as they last, be subject to the ordinary legal incidents attaching to property. A person cannot, for instance, be left in the enjoyment of property and at the same time exempted from the operation of the Bankruptcy Laws. *Brandon v. Robinson*, 18 Ves. 429; *Graves v. Dolphin*, 1 Sim. 66.

Life interest must be subject to the bankruptcy laws.

A mere trust for maintenance during the life of a person at the discretion of trustees, without giving him any interest in the subject-matter of the bequest, has been held not to pass to his assignees upon bankruptcy: *Twopenny v. Peyton*, 10 Sim. 487; *Godden v. Crowhurst*, 10 Sim. 642, a very doubtful case. But the better opinion appears now to be, that though the discretion might not be inter-

Whether a trust for maintenance passes to the creditors of a bankrupt.

ferred with, so much as the trustees think fit to apply for the benefit of the bankrupt would pass to his creditors. See *Coe's Trust*, 4 K. & J. 199.

If a life interest is given in the first instance, a clause directing the income to be applied towards the maintenance of the legatee after his bankruptcy will not prevent the interest from passing to the assignee. *Young-husband v. Gisborne*, 1 Coll. 401.

A discretion to trustees to pay or not to pay the income to the legatee for life determines on the bankruptcy of the legatee, unless the trustees are directed to withhold and accumulate the income, and the accumulations are given over. *Snowdon v. Dales*, 6 Sim. 524; *Piercy v. Roberts*, 1 M. & K. 4.

Life interest may be determined on bankruptcy.

But although life interests are expressly given, they can be determined by a conditional limitation over upon bankruptcy or alienation by the legatee. *Rochford v. Hackman*, 9 Ha. 475; *Brooke v. Pearson*, 5 Jur. N. S. 781; *Knight v. Browne*, 7 Jur. N. S. 894; 30 L. J. Ch. 649.

And a proviso for cesser of the life interest is sufficient without a limitation over. *Domett v. Bedford*, 6 T. R. 684; *Joel v. Mills*, 3 K. & J. 458.

The distinction between condition and limitation is immaterial.

It appears to be indifferent whether the original gift is only till bankruptcy, or whether it is a life interest with a conditional determination upon bankruptcy.

A gift over upon alienation takes effect if the legatee alienates, though he may not have been aware of the condition. *Carter v. Carter*, 3 K. & J. 617.

A direction that the receipt of an annuitant shall be the only discharge which the executor shall be bound to accept, and that the annuitant may be required to attend to give receipts, does not prevent the annuitant from assigning. *Arden v. Goodacre*, 11 C. B. 883.

Effect of gift over for main-

When the life interest is given over upon bankruptcy for the maintenance of the bankrupt and his family, half

the income goes to his assignees. *Rippon v. Norton*, 2 B. 63. tenance of bankrupt and his family.

But if the trustees have a discretion as to the amount to be applied towards the maintenance of the bankrupt and his family respectively, an inquiry will be directed as to how much ought to be applied for each. *Page v. Way*, 3 B. 20; *Kearsley v. Woodcock*, 3 Ha. 185; *Wallace v. Anderson*, 16 B. 533.

If, however, the trustees have a discretion to apply the fund for the maintenance of the bankrupt or his family their discretion remains, though whatever they think fit to apply for the bankrupt belongs to his creditors. *Lord v. Bunn*, 2 Y. & C. C. 98; *Holmes v. Penny*, 3 K. & J. 90; *Chambers v. Smith*, 3 App. C. 795.

It may be noticed that a gift over upon the bankruptcy of the tenant for life does not determine a power vested in him of appointing the property in question to his children, unless there are directions inconsistent with the subsistence of the power, such as a direction to distribute the property at once among the children in the event of bankruptcy. *Wickham v. Wing*, 2 H. & M. 436; *Haswell v. Huswell*, 28 B. 26; 2 D. F. & J. 456; see *Potts v. Britton*, 11 Eq. 433; *In re Stone's Estate*, I. R. 3 Eq. 621. Whether bankruptcy determines a power of appointing to children.

Where the property is given over upon alienation the term has been held to include only voluntary alienation, and not a hostile bankruptcy. *Lear v. Leggett*, 1 R. & M. 690; *Pym v. Lockyer*, 12 Sim. 394; *Graham v. Lee*, 23 B. 388. Meaning of the term alienation.

On the other hand, the presentation of a petition by the legatee under the Insolvent Debtors' Act, or under the arrangement clauses of the Bankruptcy Act, 1869, is a voluntary alienation. *Rochford v. Hackman*, 9 Ha. 475; *In re Amherst's Trusts*, 13 Eq. 464.

If there is a strong intention of personal benefit to the legatee, as if the gift is to him for life and not to his

assigns, a gift over upon alienation has been held to include bankruptcy. *Cooper v. Wyatt*, 5 Mad. 482.

"Do or suffer."

If the property is given over if the legatee should "do or suffer," or "do or permit" anything whereby the property would be vested in another, this includes a hostile bankruptcy. *Roffey v. Bent*, 3 Eq. 739; *Ex parte Eyston*; *In re Throckmorton*, 7 Ch. D. 145.

Under similar words the issue of a writ of sequestration against the legatee has been held to work a forfeiture. *Dixon v. Rowe*, 35 L. T. N. S. 549.

Deed of inspectorship.

The execution of a deed of inspectorship is not within a gift over in the event of the legatee taking the benefit of any Act for the relief of insolvent debtors. *Montefiore v. Enthoven*, 5 Eq. 35.

As to the meaning of alienation, see *Avison v. Holmes*, 1 J. & H. 530, p. 540.

Meaning of insolvency.

Insolvency has no technical meaning, but means inability to pay debts. *Freeman v. Bowen*, 35 B. 17; *Re Muggeridge*, Joh. 625; 29 L. J. Ch. 288; see *De Tastet v. Le Tavernier*, 1 Kee. 161; *Billson v. Crofts*, 15 Eq. 314.

A declaration of insolvency in S. Australia is insolvency within the meaning of a gift over upon insolvency. *Aylwin's Trusts*, 16 Eq. 585.

Marriage.

A gift over of a life interest given to the testator's widow in the event of her doing anything whereby she would be deprived of the right to receive the rents takes effect upon the marriage of the widow without making any settlement. *Craven v. Brady*, 4 Eq. 209; 4 Ch. 296.

Power of attorney.

The execution of an irrevocable power of attorney to receive an annuity is within a clause of forfeiture in the event of assignment or disposition by way of anticipation. *Oldham v. Oldham*, 3 Eq. 404.

Gift over upon bankruptcy in-

Where the property is given over upon bankruptcy, the gift over, *primâ facie*, includes a bankruptcy which takes



place after the date of the will and is subsisting at the testator's death, notwithstanding strong words of futurity. *Yarnold v. Moorhouse*, 2 R. & M. 364. cludes a subsisting bankruptcy.

And it has been held to include a bankruptcy which took place before the date of the will, and was subsisting at the death. *Manning v. Chambers*, 1 De G. & S. 282; *Seymour v. Lucas*, 1 Dr. & Sm. 177; *Trappes v. Meredith*, 10 Eq. 604; 7 Ch. 248.

But since the object of the gift over is merely to preserve the property from going to strangers, if the bankruptcy is annulled before the period of distribution the forfeiture does not take effect. *Lloyd v. Lloyd*, 2 Eq. 722; *Trappes v. Meredith*, 9 Eq. 229; *In re Parnham's Trusts*, 46 L. J. Ch. 80; *Samuel v. Samuel*, 12 Ch. D. 152; see *Robins v. Rose*, 43 L. J. Ch. 334. A bankruptcy annulled before the period of distribution will not work a forfeiture.

In the case of an immediate gift it appears the forfeiture will not take effect, where the bankruptcy is annulled within a year from the testator's death if there is no right to any payment till then. *Lloyd v. Lloyd*, 2 Eq. 722; *Ancona v. Waddell*, 10 Ch. D. 157.

This principle would not apply if one of the terms of the annulment is that the dividends accruing up to that time should be paid to the assignee. *In re Parnham's Trusts*, 13 Eq. 413.

In the case of an immediate specific bequest for life it was held that a clause of forfeiture did not operate, as the bankruptcy had been annulled before the day on which the first income was payable. *White v. Chitty*, 1 Eq. 372. See, however, *Samuel v. Samuel*, 12 Ch. D. 152.

These principles have no application where the freedom from bankruptcy is a condition precedent to the vesting. *Cox v. Fonblanque*, 6 Eq. 482; see *Samuel v. Samuel*, *supra*.

Similarly, if the life interest given over on bankruptcy is subject to a prior life interest, the gift over takes effect Bankruptcy during

prior life estate. on a bankruptcy during the life of the prior tenant for life. *Sharp v. Cosserat*, 20 B. 470; *Muggeridge's Trust* Johns. 625.

And a gift over upon bankruptcy will carry over an accrued share directed to go in the same manner as the original share, though not accruing till after bankruptcy. *Dorsett v. Dorsett*, 30 B. 250.

Separate use. 7. It is clearly settled that the corpus as well as the income of real or personal estate may be given to the separate use of a married woman. *Taylor v. Meads*, 4 D. J. & S. 607; *Cooper v. Macdonald*, 7 Ch. D. 288.

The separate use may of course be so framed as to apply to the rents and profits only, and not to the corpus. *Troutbeck v. Boughey*, 2 Eq. 534.

Separate use gives power of disposition. The effect of the separate use as regards the capital is to give the married woman a power of disposition.

If the married woman does not exercise her power of disposition the separate use is exhausted, and upon her death the husband's rights revive.

Effect of separate use on curtesy. Therefore, in the case of land given to the separate use of a married woman who dies without making a disposition, the husband is entitled to an estate by the curtesy. *Roberts v. Dixwell*, 1 Atk. 607; *Follett v. Tyrer*, 14 Sim. 125; *Appleton v. Rowley*, 8 Eq. 139; *Cooper v. Macdonald*, 7 Ch. D. 289; overruling *Hearle v. Greenbank*, 3 Atk. 675; and *Moore v. Webster*, 3 Eq. 267.

The case of *Bennett v. Davis*, 2 P. Wms. 316, is sometimes cited as an authority, that an express declaration that curtesy is not to attach to lands given to the separate use of a married woman would be effectual where no disposition is made of the lands. The question did not arise in the case, as both husband and wife were alive.

Chattels real to separate use. Chattels real belonging to the wife to her separate use vest in the husband, *jure mariti*, if she dies without disposing of them. *Archer v. Lavender*, I. R. 9 Eq. 220.

And it seems chattels in possession belonging to the wife to her separate use, and not disposed of, belong to the husband without the necessity of taking out administration to the wife. *Molony v. Kennedy*, 10 Sim. 254; *Bird v. Peagram*, 13 C. B. 639. Chattels in possession.

In giving property to a woman the marital right will be held to be excluded only by a clear indication of intention to exclude it.

The word "separate" is sufficient for this purpose, whether the legatee is married or not. *Archer v. Rorke*, 7 Ir. Eq. 478. What words create a separate use.

On the other hand, such words as "own use," "absolute use," or to pay to "her own proper hands," are not enough, whether the legatee is married or single, or whether trustees are interposed or not. *Rycroft v. Christy*, 3 B. 238; *Tyler v. Luke*, 2 R. & M. 183; *Blacklow v. Laws*, 2 Ha. 49; *Taylor v. Stainton*, 2 Jur. N. S. 634; *Wills v. Sayer*, 4 Mad. 409; *Roberts v. Spicer*, 5 Mad. 491; *Beales v. Spencer*, 2 Y. & C. C. 651.

But if the legatee is married at the time and the legacy is directed to be at her own disposal, a separate use is created. *Kirk v. Paulin*, 7 Vin. Ab. 95, pl. 43; *Prichard v. Ames*, T. & R. 222.

Directions that the receipt of a legatee, "notwithstanding coverture," and that her "sole and separate receipt" should be a good discharge, have been held to create a separate use. *Cooper v. Wells*, 11 Jur. N. S. 923; *In re Molyneux's Estate*, 1 R. 6 Eq. 411. Separate receipt.

The same has been held where the legatee was married, and her receipt was declared to be a sufficient discharge. *Lee v. Prieaux*, 3 B. C. C. 381; *Re Lorimer*, 12 B. 521.

And where a legacy was given, if husband and wife should not be living together, half to the husband and half to the wife absolutely, the wife took to her separate use. *Shewell v. Dwarries*, Johns. 172.

So, too, a direction that the devisee is to receive the rents herself, whether married or single, creates a separate use. *Goulder v. Camm*, 1 D. F. & J. 146.

Mainten-  
ance.

Probably a gift for the maintenance and support of a woman referred to by the testator as married would create a separate use. *Darley v. Darley*, 3 Atk. 399; *Cape v. Cape*, 2 Y. & C. Ex. 543; see *Wardle v. Claxton*, 9 Sim. 524.

And a power given to trustees to apply income for the maintenance and support of a widow authorises payment of the income to her separate use. *Austin v. Austin*, 4 Ch. D. 233; see *In re Peacock's Trusts*, 10 Ch. D. 490.

Effect of  
the word  
"sole"  
in creating  
a separate  
use.

The word sole may in some cases be sufficient to create a separate use, but *prima facie* it has no such technical meaning, and the burden of proof is upon those who assert it has. *Lewis v. Mathews*, 2 Eq. 177; *Massy v. Rowen*, L. R. 1 Ir. Eq. 110; *ib.*, 4 H. L. 288.

In a marriage settlement where the whole object is to secure to the wife a separate estate, the word may have the force of separate. *Ex parte Ray*, 1 Madd. 199.

But in a will where no such intention can be presumed, further indication is necessary.

a. A gift to "A., the wife of B., for her sole use," creates a separate use. *Inglefield v. Coghlan*, 2 Coll. 247; *Farrow v. Smith*, W. N. 1877, 21; *In re Amies' Estate*; *Milner v. Milner*, W. N. 1880, 16; *Bland v. Dawes*, 43 L. T. N. S. 751.

b. The same has been held where though the legatee was not in the gift to her referred to as married, it appeared from other parts of the will that she was a married woman. *Green v. Britten*, 1 D. J. & S. 649; *Hartford v. Power*, 1 R. 2 Eq. 204.

But this is not the case if the legatee be the testator's own wife, so that she must be discovert when the will takes effect. *Gilbert v. Lewis*, 1 D. J. & S. 38; *Green v. Marsden*, 1 Dr. 646.

c. If the legatee is unmarried at the time, but the testator shows that he contemplates her marriage, and expressly wishes to guard against the claims of a future husband, the same effect will follow. *Ex parte Killick*, 3 M. D. & D. G. 480; *In re Tarsey's Trust*, L. R. 1 Eq. 561.

d. So, too, if a trust is created confined to the particular gift, and no other motive for it is discernible. *Adamson v. Armitage*, 19 Ves. 416.

But the mere interposition of trustees will not give the word the force of separate if the trust is created for the general purposes of the will, and not confined to the particular gift. *Massy v. Rowen*, *supra*.

8. It is clearly settled that a married woman may be restrained from anticipating the rents and profits of real estate and the income of personalty given to her separate use. Restraint upon anticipation of income.

A restraint upon anticipation applicable to the rents of real estate devised to a married woman in tail does not prevent her from enlarging the estate tail to a fee with her husband's consent. *Cooper v. Macdonald*, 7 Ch. D. 289.

The case would probably be the same if the restraint upon anticipation were expressly applied to the corpus. *Cooper v. Macdonald*, *supra*.

A married woman entitled to real estate for life to her separate use without power of anticipation, with a testamentary power of disposition, may release her power under the Act for the abolition of fines and recoveries. *Heath v. Wickham*, 5 L. R. Ir. 285.

In the case of a restraint upon anticipation applied to the corpus of real estate, the effect appears to be to restrain the married woman from disposing either of the income or the corpus during coverture except by will. Restraint applied to corpus of property producing income. *Baggett v. Meux*, 1 Coll. 138; 1 Ph. 627.

The same rule applies to a fund of personalty producing

income given to a married woman for her separate use without power of anticipation. *In re Ellis's Trusts*, 17 Eq. 409.

Restraint upon anticipation of property not producing income.

In the case of a fund not producing income, such as a pecuniary legacy, or a share of residue directed to be converted, given to a married woman for her separate use without power of anticipation, the restraint upon anticipation has recently been held to be of no effect. *In re Croughton's Trusts*, 8 Ch. D. 460; see *Re Sykes's Trusts*, 2 J. & H. 415.

This decision appears to be conflicting with *Re Sarel*, 4 N. R. 321; 10 Jur. N. S. 876; *Re Gaskell's Trusts*, 11 Jur. N. S. 780.

Determines with coverture.

The restraint upon anticipation attaches only to the separate estate, and therefore determines with coverture. *Barton v. Briscoe*, Jac. 603; *Jones v. Salter*, 2 R. & M. 208; *Woodmeston v. Walker*, 2 R. & M. 197.

But if nothing is done with the property in the meantime it revives on future coverture: *Tullett v. Armstrong*, 1 B. 1; 4 M. & Cr. 390; *Scarborough v. Borman*, 1 B. 34; 4 M. & Cr. 378; *Re Gaffee*, 1 Mac. & G. 541; unless the restraint is confined to marriage with a particular husband by name. *Morris v. Morris*, 4 Dr. 33; *Hawkes v. Hubbuck*, 11 Eq. 5; see *In re Molyneux's Estate*, 1 R. 6 Eq. 411.

But a sale or conversion of the property destroys the separate use. *Wright v. Wright*, 2 J. & H. 647.

What words create a restraint upon anticipation.

Difficulties have sometimes arisen as to what words are necessary to create a restraint on anticipation.

A direction that there is to be no sale or mortgage of the estate devised or the rents arising from it during the life of the devisee, amounts to a restraint on anticipation. *Baggett v. Meux*, 1 Coll. 138; 1 Ph. 627; *Goulder v. Camm*, 1 D. F. & J. 146; *Steedman v. Poole*, 6 Ha. 193.

The same has been held of a direction that the receipts

of the devisee alone, after the payment of the rents devised shall have become due, should be sufficient discharges. *Field v. Evans*, 15 Sim. 375 ; *Baker v. Bradley*, 7 D. M. & G. 597 ; *White v. Herrick*, 21 W. R. 454.

But a direction to pay to the legatee personally, or on her receipt alone, will not restrain anticipation. *Re Ross's Trust*, 1 Sim. N. S. 196 ; *Wagstaff v. Smith*, 9 Ves. 520, 524 ; *Acton v. White*, 1 S. & St. 429.

When the legatee has a power to appoint the accruing rents, but not by way of anticipation, and in default of appointment there is a gift to her for her separate use, the restraint upon anticipation applies only to the exercise of the power. *Barrymore v. Ellis*, 8 Sim. 1 ; *Medley v. Horton*, 14 Sim. 222.

But if the gift in default of appointment is followed by a receipt clause applied to the same rents as those she has power to appoint, the restraint upon anticipation will extend to the whole gift. *Moore v. Moore*, 1 Coll. 54 ; *Brown v. Bamford*, 1 Ph. 620.

## CHAPTER XXXVI.

## LIMITATIONS BY WAY OF REMAINDER—DIVESTING.

## WHAT CANNOT BE GIVEN OVER.

IN some things nothing less than an absolute interest can be given.

Remainder  
in chattels.

There can be no remainder in the strict sense of the word of chattels. At law a grant of chattels for life vests the whole legal interest in the tenant for life.

This rule, however, does not apply to gifts by will. It has long been settled that under a gift by will of a term to A. for life, and after his death to B., or to the children of A., the legal interest passes by way of executory devise to the person entitled under the will on the death of the tenant for life. *Manning's Case*, 8 Rep. 94 b; *Lampet's Case*, 10 Rep. 46 b; *Stevenson v. Mayor of Liverpool*, L. R. 10 Q. B. 81.

In some cases the nature of the property is such as not to allow of successive limitations; thus:—

Consum-  
able  
articles  
cannot be  
given over.

Things *quæ ipso usu consumuntur* cannot be given over, unless they form part of a stock-in-trade. *Randall v. Russell*, 3 Mer. 190; *Andrew v. Andrew*, 1 Coll. 690; *Groves v. Wright*, 2 K. & J. 347; *Bryant v. Easterson*, 7 W. R. 298; 5 Jur. N. S. 166; *Phillips v. Beal*, 32 B. 25; *Cockayne v. Harrison*, 13 Eq. 432; see *Re Hall's Will*, 19 Jur. 974.

Even in the case of stock-in-trade if the tenant for life is not to be liable for depreciation he takes absolutely. *Breton v. Mockett*, 9 Ch. D. 95.



Absolute interests can of course not be limited over by way of remainder; thus a devise, if A. dies without heirs, after a prior devise to A. in fee, is void. *Tilbury v. Tarbut*, 3 Atk. 617; 1 Ves. sen. 88. There can be no remainder after an absolute interest.

And in the same way absolute interests in personalty cannot be given to several persons in succession. *Byng v. Lord Strafford*, 5 B. 558.

A gift over, which would be invalid supposing the prior legatee survives the testator, does not become valid by his death in the testator's lifetime. A gift over invalid in itself does not become valid by the death of the prior legatee before the testator.

Therefore, a gift of personalty to A. and the heirs of his body, remainder to B., lapses by A.'s death in the testator's lifetime. *Harris v. Davis*, 1 Coll. 416; see however, *In re Stringer's Estate*; *Shaw v. Jones-Ford*, 6 Ch. D. 1.

So, too, a gift of consumable articles to A. for life, remainder to B., lapses by A.'s death before the testator. *Andrews v. Andrews*, 1 Coll. 690.

There can be no gift over of so much as a legatee does not dispose of where an absolute interest has been given to the legatee. *Watkins v. Williams*, 3 Mac. & G. 622; *Henderson v. Cross*, 29 B. 216; *Bower v. Goslett*, 27 L. J. Ch. 249; 6 W. R. 8. Gift over of so much as a legatee does not dispose of is void.

Nor can there be a gift over of what remains after payment of the debts of a legatee to whom an absolute interest is given. *Perry v. Merritt*, 18 Eq. 152.

However, a gift at the legatee's death of whatever remains after a gift to the legatee indefinitely may be construed as a disposition of the residue at the legatee's death, so as to cut him down to a life estate. *Constable v. Bull*, 3 De G. & Sm. 411; *Adams' Trust*, 14 W. R. 18; *Bibbens v. Potter*, 10 Ch. D. 733.

And if a fund is given to a person expressly for life, with a power of disposing of it during her life or by will, a gift of it after the death of the donee of the power Gift over after a life interest, with power

of disposition. is good, so far as she does not exercise the power  
*Pennock v. Pennock*, 13 Eq. 144; *In re Thomson's Estate*;  
*Herring v. Barrow*, 13 Ch. D. 144; 14 *ib.* 263; *In re*  
*Stringer's Estate*; *Shaw v. Jones-Ford*, 6 Ch. D. 1; see  
*Re Brook's Will*, 2 Dr. & S. 362.

#### LIMITATIONS DISTINGUISHED.

Limitations (excluding immediate limitations of particular estates) fall most naturally into limitations disposing of property in which partial or contingent interests have been previously given, and limitations varying and re-arranging previous dispositions.

Legal remainder and executory interests.

A legal remainder of freehold must be supported by a previous estate of freehold, otherwise it can only be supported as an executory devise.

And as no limitation can be a remainder following upon an estate less than an estate for life, so no limitation can be a remainder following upon a determinable fee, or any greater estate. *Fearne*, C. R. 225; *Seymour's Case*, 10 Co. 95, *b.*

But where an estate can take effect as a remainder, it will never be construed an executory devise or springing use: *Carwardine v. Carwardine*, 1 Ed. 27; *Goodtitle v. Billington*, Dougl. 725; *Fearne*, C. R. 386; the reason given being that "executory interests, not by way of remainder, unless engrafted on an estate tail, cannot be barred, and consequently there is a tendency in such interests to a perpetuity, which is contrary to the policy of the law." *Smith's Ex. Dev.* 71.

Incidents of remainders.

Contingent remainders can no longer fail by forfeiture, surrender, or merger, but (except in cases within 40 & 41 Vict. c. 33) they will fail by the failure of the particular estate of freehold, before the remainder is ready to come into possession. *Rhodes v. Whitehead*, 2 Dr. & Sm. 532;

*Price v. Hall*, 5 Eq. 399; *Percival v. Percival*, 9 Eq. 386; *Brackenbury v. Gibbons*, 2 Ch. D. 417.

Contingent remainders of copyholds are liable to fail in the same way by failure of the particular estate before they have vested, see *ante*, p. 245.

This rule does not apply to equitable remainders, which are not remainders proper but in the nature of executory interests. *Hopkins v. Hopkins*, Ca. t. Talb. 44; 1 Atk. 581; *Re Eddel's Trust*, 11 Eq. 559.

A legal estate outstanding in a mortgagee is sufficient to support the remainders. *Astley v. Micklethwait*, 15 Ch. D. 59.

The rule does not, of course, apply to personalty.

By 40 & 41 Vict. c. 33, which applies to wills executed or republished after the 2nd August, 1877, contingent remainders are, "in the event of the particular estate determining before the contingent remainder vests," to take effect as executory limitations. See *ante*, p. 245.

An estate may, according to the events that happen, be either a remainder or an executory devise. For instance, if after life estates there is a devise to children in fee, and if they die under twenty-one over, the devise over, if there are children to take who die under twenty-one, would be an executory devise; yet the implied devise over, in case there were no children to take at all, would be a contingent remainder. *Evers v. Challis*, 18 Q. B. 224; 7 H. L. 531; *Brookman v. Smith*, L. R. 6 Ex. 291, p. 305.

An estate may be a remainder or an executory devise, according to the events.

A remainder must be distinguished from an immediate vested estate, subject to a term; thus, where an estate of freehold is limited after a term, it is either a vested estate or an executory devise. For instance, a devise to A. for a term of eighty years, if he shall so long live, and after his death to B., gives B. strictly speaking an executory interest, since A. may live longer than eighty years, and the freehold would therefore be in suspense during the

Remainder distinguished from an immediate vested estate subject to a term.

remainder of A.'s life. It has, however, been held that B. takes a vested interest, "for the mere possibility that a life in being may endure for eighty years to come does not amount to a degree of uncertainty sufficient to constitute a contingency." *Fearne*, C. R. 21; *Napper v. Sanders*, Hutt. 118, cit. 3 At. 781; *Lord Derby's Case*, cit. Lit. Rep. 370; *Fearne*, C. R. 22.

This applies, however, only "where the life cannot exceed the term, and the term must determine with the life." It does not apply, for instance, where the term is only for sixty years. *Beverley v. Beverley*, 2 Vern. 131.

Devise  
after pay-  
ment of  
debts is  
vested.

In the same way a devise, after payment of debts, is not a remainder but an immediate vested interest. *Barnardiston v. Carter*, 1 P. W. 505; 3 B. P. C. 64; *Bagshaw v. Spencer*, 1 Ves. sen. 142; see 1 Coll. Jur. 378; and see *ib.* 214.

Remain-  
ders and  
alternative  
contingent  
limita-  
tions.

Again, dispositions by way of remainder may be intended to take effect only after the determination of prior partial interests, or they may be alternative contingent remainders intended to provide for the case of prior contingent limitations not taking effect. In the former case, if any of the intermediate limitations are void, the remainders fail with them; in the latter, the limitations are good if the events upon which they are to take effect happen. *Brudenell v. Elwes*, 1 East, 442; *Crompe v. Barrow*, 4 Ves. 681.

Thus, in a devise to A. for life, then to his first son for life, and after his decease to the first and other sons of such first son successively in tail, and in default of issue of A., or in case of his not having any at his decease over, if A. has a son and grandson, the devise over in default of issue of A. is a disposition by way of remainder of something not previously disposed of; while the devise, in case of his not having any issue at his decease, is an alternative contingent limitation, disposing of something previously

disposed of, in the event of that disposition failing in a particular way. *Monypenny v. Dering*, 2 D. M. & G. 145; *Doe v. Challis*, 18 Q. B. 224; 7 H. L. 531; *Percival v. Percival*, 9 Eq. 386.

And the same limitation may, according to the events that happen, be a disposition to take effect after the failure of prior limitations, or a substitutional limitation intended to meet the case of prior limitations never taking effect at all. For instance, a limitation in default, or for want of persons to take under prior limitations for life or in tail, takes effect either in default of persons to take the prior estates, or after the determination of their estates. *Goodright v. Jones*, 4 Mau. & S. 88; *Lewis v. Waters*, 6 East, 336; see *Doe v. Dacre*, 1 B. & P. 250; 8 T. R. 112.

When a particular estate is limited upon a contingency, and the subsequent estates are limited as remainders upon it, the contingency *primâ facie* applies to the whole series of limitations. *Davis v. Norton*, 2 P. W. 390; *Doe d. Watson v. Shippard*, Dougl. 75; *Tolderry v. Colt*, 1 Y. & C. Ex. 240, 627; 1 M. & W. 250.

Whether a contingency runs through a whole series of limitations.

Similarly, when an interest is given to a person, and then in a certain event a different interest is given with limitations over, the contingency applies to all the subsequent limitations. *Gray v. Golding*, 6 Jur. N. S. 474; *Cattley v. Vincent*, 15 B. 198; *Findon v. Findon*, 24 B. 83; *Lett v. Randall*, 10 Sim. 112; *Paylor v. Pegg*, 24 B. 105.

On the other hand, if the subsequent limitations, or any of them, can be looked upon as independent gifts, they will not be liable to the contingency of preceding gifts. *Lethieullier v. Tracy*, 3 Atk. 774; Amb. 204; *Boosey v. Gardiner*, 5 D. M. & G. 122; *Doutty v. Laver*, 14 Jur. 188; *Partridge v. Foster*, 35 B. 545; *In re Blight*; *Blight v. Hartnoll*, 13 Ch. D. 858.

Cases where the subsequent limitations are independent gifts.

In the same way, if a particular gift is expressed to

be made contingent from motives applicable to that gift only, subsequent gifts will not be contingent. *Horton v. Whittaker*, 1 T. R. 346.

Subsequent gifts subject to prior contingent gifts.

And if subsequent gifts can be read as given, subject to the prior limitations, they will not be liable to the contingencies of prior gifts. *Sheffield v. Earl of Coventry*, 2 D. M. & G. 551; see *Pearson v. Rutter*, 3 D. M. & G. 398; 6 H. L. 61; *Hole v. Davies*, 34 B. 345; *ante*, pp. 404, 405.

Where the ultimate limitation sums up the prior contingencies.

In the same way, when there has been a gift in one event to one set of issue in fee, and upon another event to another set of issue in tail, a gift over in default of such issue may be construed as referring to a failure of all the prior limitations, and not merely as a remainder dependent upon the limitations to the second class of issue taking effect. *Doe d. Lees v. Ford*, 2 E. & B. 970.

Whether an ultimate limitation applies to the whole of property which has been given in two independent lines.

As to whether in a devise of Whiteacre to A. and his issue, and then to B. and his issue, and of Blackacre to B. and his issue, and then to A. and his issue, and in default of issue of A. and B. over, the ultimate gift includes both estates, see *Gordon v. Gordon*, L. R. 5 H. L. 254; see, too, *Adshead v. Willets*, 29 B. 358.

### DIVESTING.

A gift which is given over in certain events is divested if those events happen.

A vested interest which is given over in certain events is divested, if those events happen, though the gift over may be void, or though the legatee to take under the gift over dies before the testator. *Doe d. Blomfield v. Eyre*, 5 C. B. 713; *Robinson v. Wood*, 6 W. R. 728; 27 L. J. Ch. 726; *O'Mahoney v. Burdett*, L. R. 7 H. L. 388. In *Jackson v. Noble*, 2 Kee. 500, the question was, whether the event upon which the gift over was to take effect had happened, and it was held it had not, the period during

which it was to take effect being limited to the lives of the persons to take under the gift over.

But if the contingency of there being a person to take living at the time can be looked upon as part of the event upon which the gift over is to take effect, the original gift will remain if there is no such person. *Crozier v. Crozier*, 15 Eq. 282.

Upon this principle, under a gift to the testator's two sons and daughter in equal shares, with a gift over of the daughter's share, if she should die without issue, to the survivors or survivor of the sons, it was held that the daughter having survived the sons took absolutely. *Jones v. Davies*, 28 W. R. 455; see *Eaton v. Barker*, 2 Coll. 124.

In the case of a substitutional gift to several persons, or to such of them as may survive the tenant for life, if none survive the tenant for life the original gift remains, whether the gift is vested or contingent. *Sturgess v. Pearson*, 4 Mad. 411; *Wagstaff v. Crosbie*, 2 Coll. 746; *Re Saunders' Trust*, L. R. 1 Eq. 675.

It is indifferent whether the gift is in the simple form "to several or the survivors," or whether there is an express gift over in the event of any members of a class dying before the tenant for life to the survivors; in such a case, if none survive the tenant for life, the original gift remains. *Harrison v. Foreman*, 5 Ves. 207; *Cambridge v. Rous*, 25 B. 409; *Marriott v. Abell*, 7 Eq. 478.

Similarly the shares of parents given in the event of their dying before the tenant for life to their children, remain absolute if there are no children. *Smither v. Willock*, 9 Ves. 233; *Hodgson v. Smithson*, 21 B. 356; 8 D. M. & G. 604.

An important distinction must, however, be drawn between a gift over of the whole of a prior interest in certain events, and a gift over of a portion of the prior

Substitutional gifts to survivors.

Substitutional gifts to children.

Distinction between a gift over in certain events of

the whole  
and of a  
partial  
interest.

interest in certain events. In the latter case the prior interest is divested only so far as is necessary to give effect to the gift over.

Thus, if there is a devise in fee, followed by a gift over to another person for life if the devisee dies without issue, the devisee in that event, nevertheless, takes the fee, subject only to the life interest: *Gatenby v. Morgan*, 1 Q. B. D. 685.

### THE CONSTRUCTION OF GIFTS OVER.

Gifts over  
on two  
different  
events to  
different  
persons  
where both  
events  
happen.  
The exact  
event must  
happen in  
order that  
a gift over  
may take  
effect.

When property is given over in one event to one person, and in another event to another, and both events occur simultaneously, the original gift is not divested. *Ormerod v. Riley*, 12 Jur. N. S. 112. See *Drennan v. Andrew*, 36 L. J. Ch. 1.

When there is a gift over upon a certain contingency, it will not take effect unless the exact contingency happens. Thus, if there is a gift to A. with a gift over if he dies in the testator's lifetime, and A. dies simultaneously with the testator, the gift over does not take effect. *Wing v. Angrave*, 8 H. L. 183.

There are here two distinct and independent events, in which the gift to A. will lapse, death in the testator's lifetime and death simultaneously with the testator, one of which the testator has contemplated and the other not. No doubt, it may be said, that the gift over might be read as equivalent to "if A. does not survive me to B.;" but this would be making a will for the testator, since the event that has happened does not include the event contemplated, and it cannot be said, that if the gift over was to have effect if A. died in the testator's lifetime, *a fortiori* it was to have effect if A. died simultaneously with the testator. The most that can be affirmed is that if the



testator could be consulted he would probably say, that the gift over was to have effect equally in either event.

But where the events which happen include the events contemplated by the testator, so that it may be said, if the gift was to go over in the events mentioned, *à fortiori* it must have been meant to go over in the events that have happened, the gift over will take effect. This is the rule mentioned by Cicero as having been adopted in the case of *Curius v. Coponius*: "*M. Curium, qui hæres institutus esset ita, 'mortuo postumo filio,' cum filius non modo non mortuus, sed ne natus quidem esset, hæredem esse oportere.*" Pro. Cæc. 18.

Cases where the events which happen include the events upon which the gift over is to take effect.

And the test of the applicability of the rule will be found in the possibility of putting the argument in its favour in the form of *non modo non—sed ne quidem*—if, for instance, property is given to A. if he fulfil certain conditions, and if he neglect to fulfil them to B., and A. dies in the testator's lifetime, the gift over to B. will take effect, although, strictly speaking, the testator never contemplated that the performance of the conditions annexed to the gift to A. might become impossible through A.'s death in his lifetime. The preceding estate being out of the way, in any mode whatever, the remainder takes effect; and the rule applies whether the gift is void in its inception or becomes void in its result. See *Jones v. Westcomb*, 1 Eq. Abr. 245, pl. 10; *Gulliver v. Wickett*, 1 Wils. 105; *Avelyn v. Ward*, 1 Ves. sen. 420; *Meadows v. Parry*, 1 V. & B. 124; *Warren v. Rudall*, 4 K. & J. 603, and 9 H. L. 420; *Brock v. Bradley*, 33 B. 670.

The failure of the prior gift in these cases was not owing merely to the fact that the first taker did not survive the testator, as in the cases under the former head, but to that fact, *plus* the non-performance of the condition, since, if the first taker had survived the testator he would not have

taken an indefeasible interest till the condition had been satisfied.

So a gift to several persons by name, with a gift over if they should die in the testator's lifetime, will take effect with regard to the shares of those who are dead at the date of the will. *Barnes v. Jennings*, L. R. 2 Eq. 448.

Construction of gifts over upon death of the legatee under a given age. Case where the legatee dies before the testator under the given age.

If there is a gift to a person with a gift over in the event of his death in a particular manner, as for instance to A., and if he dies under twenty-one to B.:—

1. If A. dies under twenty-one, in the lifetime of the testator, the gift over takes effect. *Darrel v. Molesworth*, 2 Vern. 378; *Willing v. Baine*, 2 Eq. Ab. 545, pl. 22; 3 P. Wms. 115; *Humphreys v. Howes*, 1 R. & M. 639; *Re Green's Estate*, 1 Dr. & Sm. 68; *Rackham v. De la Mare*, 2 D. J. & S. 74. In this case the failure of the prior gift is due not to lapse merely, since if A. had survived the testator the gift to him would not have been indefeasible until he had attained twenty-one.

Where the legatee dies over the given age before the testator.

2. If A. dies over twenty-one in the testator's lifetime, the gift over does not take effect. *Williams v. Chitty*, 3 Ves. jun. 545; *Doo v. Brabant*, 3 B. C. C. 393; 4 T. R. 706; *Humberstone v. Stanton*, 1 V. & B. 385; *McCarthy v. McCarthy*, 3 L. R. Ir. 317.

In this case since A., if he had survived, would have taken an indefeasible interest, the failure of the gift to him is due to lapse only, which the testator cannot be supposed to have contemplated, and the event on which alone there is a bequest to the claimant has not occurred.

Where, however, the prior gift is to a class, the following rules may be laid down; suppose a gift to children as a class, followed by a gift over, if they die under twenty-one:—

Gift to a class followed by a gift over if all die

1. If the contemplated class never comes into existence, the gift over takes effect on the principle already stated, ante: *Jones v. Westcomb*, 1 Eq. Ab. 245, pl. 10; *Mac-*

*kinnon v. Sewell*, 2 M. & K. 202. In these cases the condition is more than fulfilled, since the events that have happened include the condition upon which the property is given over. under 21, where the class never comes into existence.

2. If members of the class come into existence, but die under twenty-one in the testator's lifetime. In this case, too, it seems the gift over will take effect, and the same arguments would apply as to the previous case, with the additional argument that the condition is in fact literally fulfilled. It is not by reason of lapse that the gift over takes effect, since if the legatees in question had survived the testator, the gift over would still have held good in the events that have happened. See *Brookman v. Smith*, L. R. 6 Ex. p. 303; *Mackinnon v. Peach*, 2 Kee. 555; but see *Greated v. Greated*, 26 B. 621. If all die under 21 before the testator.

3. If members of the class come into existence, survive twenty-one, and die in the testator's lifetime, the gift over will not take effect: *Tarback v. Tarback*, 4 L. J. Ch. 129; *Brookman v. Smith*, L. R. 6 Ex. 291; *ib.* 7 Ex. 271; or, to state the rule more generally, if all conditions are fulfilled which would entitle those taking under the prior gift to indefeasible interests, supposing they had survived the testator, if in other words the failure of the prior gift is due to lapse and lapse only, the gift over does not take effect. If all die before the testator, but not under 21.

#### GIFTS OVER UPON DEATH TREATED AS A CONTINGENT EVENT.

1. If there is an immediate gift to A., and a gift over in case of his death, or any similar expression implying the death to be a contingent event, the gift over will take effect only in the event of A.'s death before the testator. Gift over in case of the legatee's death.

*Lord Bindon v. Earl of Suffolk*, 1 P. Wms. 96; *Turner*

v. *Moor*, 6 Ves. 556; *Cambridge v. Rous*, 8 Ves. 12; *Crigan v. Baines*, 7 Sim. 40; *Taylor v. Stainton*, 2 Jur. N. S. 634; *Ingham v. Ingham*, 1 R. 11 Eq. 101.

This rule applies though the gift over may be to persons "then living," or to survivors. *Trotter v. Williams*, Prec. Ch. 78; *King v. Taylor*, 5 Ves. 806.

So, too, a gift to several, with a gift over in case of the death of either in the lifetime of the others or other, was confined to death before the testator, the death of one before the other being a certain and not a contingent event. *Howard v. Howard*, 21 B. 550.

It makes no difference that the gift in case of A.'s death is to his children. *Slade v. Milner*, 4 Mad. 144; *Schenck v. Agnew*, 4 K. & J. 405.

And this construction has been adopted where the gift over was "in case of his decease or at his decease." *Arthur v. Hughes*, 4 B. 506.

Gift over  
at the lega-  
tee's death.

But, as a rule, when there is a gift to A. indefinitely, followed by a gift at his decease, A. will take only a life interest. *Constable v. Bull*, 3 De G. & S. 411; *Waters v. Waters*, 26 L. J. Ch. 624; *Adams' Trusts*, 14 W. R. 18; *Joslin v. Hammond*, 3 M. & K. 110; *Reid v. Reid*, 25 B. 469; *Bibbens v. Potter*, 10 Ch. D. 733.

General  
intention  
that the  
gift was to  
take effect  
after A.'s  
death.

2. A gift over "in case of the death of A." has been construed as equivalent to "after his death" in the following cases:—

a. Where the gift is only of a life interest, and the remainder would otherwise be undisposed of. *Smart v. Clark*, 3 Russ. 365; *Tilson v. Jones*, 1 R. & M. 553; *Ingham v. Ingham*, 1 R. 11 Eq. 101.

b. Where the testator has given the absolute interest in another legacy in express terms, or has shown an intention to provide in all events for the person to take "in case of the death of A.," or has expressly provided for the death of the legatee in his lifetime with regard to another legacy

to the same legatee, there is ground for arguing that the gift over in case of the death of A. was to take effect upon his death at any time. *Billings v. Sandom*, 1 B. C. C. 393; *Nowlan v. Nelligan*, 1 B. C. C. 489; *Douglas v. Chalmer*, 2 Ves. jun. 501.

c. So a direction in the event of A.'s death to *continue* her annuity for the benefit of her children will not be construed as providing only against lapse. *Wilkins v. Jodrell*, 13 Ch. D. 564.

3. If the gift is after a life estate, or a time is appointed for payment, the words "in case of death" refer to death at any time before the vesting in possession, whether before or after the testator. *Hervey v. M'Laughlin*, 1 Pr. 264; *Johnson v. Antrobus*, 21 B. 556; *Bolitho v. Hillyar*, 34 B. 180; and see *James v. Baker*, 8 Jur. 750.

Gift over in case of the legatee's death after a life interest.

It appears that a gift after a life interest to executors for their trouble, with a gift over in case of death, would *prima facie* mean death before the testator. *Green v. Barrow*, 10 Ha. 459.

4. In the case of realty a devise to A. simply in a will before the Wills Act, and in case of his death over, would perhaps be construed as to A. for life, and after his death over. *Bowen v. Scowcroft*, 2 Y. & C. Ex. 640; see, however, *Wright v. Stephens*, 4 B. & Ald. 574.

Gift over of realty in case of the death of the devisee.

On the other hand, if the devise gives A. the fee, a gift over, in case of A.'s death, will be held to refer to his death before the testator. *Rogers v. Rogers*, 7 W. R. 541.

#### GIFTS OVER UPON DEATH COUPLED WITH A CONTINGENCY.

If there is an immediate gift to A., and if he dies without issue over, the gift over takes effect upon the death

Gift over upon death without

issue is not confined to death before the testator. of A. without issue at any time, whether before or after the testator. *Farthing v. Allen*, 2 Mad. 310; 2 Jarm. 730; *Smith v. Stewart*, 4 De G. & Sm. 253; *Cotton v. Cotton*, 23 L. J. Ch. 489; *Bowers v. Bowers*, 8 Eq. 283; 5 Ch. 244; *Else v. Else*, 13 Eq. 196; *Varley v. Winn*, 2 K. & J. 705.

The fourth rule in *Edwards v. Edwards* is overruled. Similarly, if the gift is future, as to A. for life and then to B., and if B. dies without issue over, the gift over will take effect upon the death of B. at any time without issue, whether before or after the tenant for life. *O'Mahoney v. Burdett*, L. R. 7 H. L. 388; *Ingram v. Soutten*, *ib.* 408; overruling the so-called fourth rule in *Edwards v. Edwards*, 15 B. 357.

And similarly, a direction to settle a legacy upon marriage is *prima facie* not restricted to marriage in the lifetime of a tenant for life. *Witham v. Witham*, 3 D. F. & J. 758.

In what cases the period of defeasibility will be limited. There may, however, be circumstances in the will limiting the defeasibility to some earlier time than the death of the legatee without issue. Some of the cases decided on the authority of *Edwards v. Edwards* are probably not reconcilable with the rule laid down in *Ingram v. Soutten*. See *Allen's Estate*, 3 Dr. 380.

The following rules seem, however, to be admitted in *O'Mahoney v. Burdett*.

Gift over to survivors. 1. Possibly, where there is a gift over if any members of a class die without issue to the survivors, the gift over must take effect, if at all, before the time when the survivors are to be ascertained.

Thus, if the gift is immediate the gift over may be limited to the happening of the event in the testator's lifetime. *In re Smaling*; *Johnson v. Smaling*, 26 W. R. 231; see *Apsey v. Apsey*, 36 L. T. N. S. 941; a case apparently inconsistent with *Bowers v. Bowers*.

If the gift is, after a life interest, to several and if any

die without issue to the survivors, the gift over may in the same way be limited to death without issue before the tenant for life. See *Clark v. Henry*, 11 Eq. 222; 6 Ch. 588; *Besant v. Cox*, 6 Ch. D. 604.

2. If the fund is vested in trustees who are directed to distribute it at a certain time, so that the trusts then determine, and the legatees who are to take upon the death of prior legatees without issue are contemplated as taking through the medium of the same trustees, there is *prima facie* reason for restricting the death without issue to death without issue before the period of distribution. *Galland v. Leonard*, 1 Sw. 161; *Wheable v. Withers*, 16 Sim. 505; *Edwards v. Edwards*, 15 B. 357; *Beckton v. Barton*, 27 B. 99; *Dean v. Handley*, 2 H. & M. 635; see *Smith v. Colman*, 25 B. 217.

Where the donees to take upon death without issue of a prior legatee are contemplated as taking through the medium of a trust which determines at a certain time.

But words directing payment or distribution at a certain time will not confine the contingency to that time, if the persons to take upon the death without issue of a prior legatee are not treated as taking through the medium of the same payment or distribution. *Gosling v. Townshend*, 17 B. 245; 2 W. R. 23.

3. And if there are no trustees, but payment or division is directed at the death of the tenant for life, and all the subsequent dispositions are made with reference to the same payment or division, the death without issue will be confined to such death before the period of distribution. *Olivant v. Wright*, 1 Ch. D. 346; see *Re Anstice*, 23 B. 135; *Pearman v. Pearman*, 33 B. 394.

When all the dispositions of the testator have reference to the period of distribution.

So, if there is a life tenancy and then a gift to a class to be paid when they respectively attain twenty-one, and if any die without issue to the survivors, to be paid at the same time as the original share, death without issue will be limited to such death under twenty-one. *Re Johnson's Trusts*, 10 L. T. N. S. 455; *Re Hayne's Trusts*, 18 L. T. N. S. 16.

Similarly, if the gift is to A. if living at the death of the tenant for life, and if not, to his children, and if he dies without children over, the ultimate gift over is confined to the lifetime of the tenant for life. *Andrews v. Lord*, 8 W. R. 405; see *Wood v. Wood*, 35 B. 587; *In re Hill's Trusts*, 12 Eq. 302.

When the legatee is to have the absolute control at a certain time.

When gifts over subsequent to the gift over upon death without issue are expressly limited within a certain time.

4. When there is a direction that a legatee is to have the absolute control of her legacy at a particular time, a subsequent gift over will be limited to take effect before that time. *Clark v. Henry*, 11 Eq. 222; 6 Ch. 588.

5. If there is a gift over upon death without issue before a given time of all the legatees whose shares have previously been given over upon death leaving issue indefinitely, or if the gift to the persons who are to take upon death of the prior legatees without issue is again given over upon the death of such persons before a certain time, there is a strong argument for restraining the prior gifts over to death of the prior legatees without issue before the same time. *Re Hayes' Will*, 9 Jur. N. S. 1068; *Re Sarjeant*, 11 W. R. 203; *Da Costa v. Keir*, 3 Russ. 360; see *Doe d. Lifford v. Sparrow*, 13 East, 359; *Lloyd v. Davies*, 15 C. B. 76.

Gifts over in several events, one of which must happen, after prior gift with words of limitation or benefit.

6. If the gift is followed by words of limitation or benefit, as "to A., his heirs, and assigns," or "to A. for ever," or "to A. for his own use and benefit," and the property is then given over upon contingencies, one or other of which must happen; as, for instance, upon death either with or without children, the defeasibility will be limited by the period of distribution, whether it is the testator's death or some other time, in order not to cut down the previous absolute interests to life interests merely. *Doe v. Sparrow*, 13 East, 359; *Clayton v. Lowe*, 5 B. & Ald. 636; *Gee v. Corporation of Manchester*, 17 Q. B. 737; *Woodburne v. Woodburne*, 23 L. J. Ch. 336; *Da Costa v. Keir*, 3 Russ. 360; *Slaney v. Slaney*, 33 B. 631.



If, however, the gift is merely in general words without any express indication that it is intended to be absolute, the fact that the contingencies upon which the property is given over in effect reduce the interest to a life interest, will not have the effect of confining the happening of the contingencies to the period of distribution. *Gosling v. Townshend*, 2 W. R. 23; *Cooper v. Cooper*, 1 K. & J. 658; *Bowers v. Bowers*, 8 Eq. 283; 5 Ch. 244.

7. It is not, however, necessary in order to limit the defeasibility that the gifts over should be upon contingencies, one or other of which must occur, so as to cut down the prior interest to a life estate, unless the defeasibility is limited. General intention to give the legatees indefeasible interests at a certain time.

In *Clayton v. Lowe*, *Gee v. Mayor of Manchester*, and *Woodburne v. Woodburne*, *supra*, the interest of the surviving legatee would not necessarily have been reduced to a life estate, and if it is once clear that the legatee is to take an absolute interest, a gift over in one event is as inconsistent with that absolute interest as a gift over in several, one of which must occur.

And accordingly, where the intention to give indefeasible interests at a particular time is clear, the gift over upon a single contingency, as upon death without issue, will be limited to death without issue before that time. *Brother-ton v. Bury*, 18 B. 65; *Ware v. Watson*, 7 D. M. & G. 248; *Re Anstice*, 23 B. 135; *Clark v. Henry*, 11 Eq. 222; 6 Ch. 588; perhaps *Barker v. Cocks*, 6 B. 82, and *Davenport v. Bishopp*, 2 Y. & C. C. 463, come under this head.

8. If the gift is contingent, as to A. at twenty-one, there is some reason for restricting a gift over upon death coupled with a contingency to such death under twenty-one. Gift over upon death leaving children after a contingent gift.

It seems clear that this construction would be adopted if the gift over is upon the death of A. leaving children

to his children, in order to provide for the children of A., if he dies under twenty-one leaving children: *Home v. Pillans*, 2 M. & K. 15.

It seems the same would be the case if the person to take under the gift is the widow of the legatee. *Randfield v. Randfield*, 8 H. L. 225.

The gift over upon death without issue cannot, however, be restricted to the time of vesting, where there is an express gift over upon death merely, before the time of vesting. *Martineau v. Rogers*, 8 D. M. & G. 328.

Whether the defeasibility would be limited where the gift over is to strangers is more doubtful. See *Andrews v. Lord*, 6 Jur. N. S. 865; and see *Dowling's Trusts*, 14 Eq. 463; *Smith v. Spencer*, 6 D. M. & G. 631.

Ultimate  
gift over  
upon death  
without  
issue  
restricted  
by prior  
gift.

9. Where there is a gift to two persons, and if either dies under twenty-one without issue to the survivor, and if both die without issue over, the defeasibility will be restricted to the age of twenty-one. *Kirkpatrick v. Kirkpatrick*, 13 Ves. 476; *Thackeray v. Hampson*, 2 S. & St. 214; see *Else v. Else*, 13 Eq. 196.

Gift over  
upon mar-  
riage with-  
out consent  
confined to  
marriage  
under 21.

10. When there is a gift at twenty-one, or upon marriage with consent, a gift over upon marriage without consent has been confined to the age of twenty-one. *Desbody v. Boyville*, 2 P. Wms. 547; *Knapp v. Noyes*, Amb. 662; *Osborn v. Brown*, 5 Ves. 527; *West v. West*, 4 Giff. 198; *Duggan v. Kelly*, 10 Ir. Eq. 473.

11. It may be noticed that where there is a gift to several, and in case of the death of any to the survivors, and if they die without children over, the gift, in case of death, will not be extended to mean death at any time, nor will the gift upon death without children be confined to such death in the lifetime of the testator. *Clarke v. Lubbock*, 1 Y. & C. C. 492; *Child v. Giblett*, 3 M. & K. 71.

## CHAPTER XXXVII.

## SUBSTITUTION.

EVERY executory limitation intended to destroy prior interests in certain contingencies is in the widest sense substitutional. The term is, however, generally applied to limitations intended to provide for the death of prior legatees before the period of distribution.

The simplest form of substitutional gift, introduced by the word "or," as for instance, to class A. or class B., generally involves the relation of greater to smaller class, or of ancestor to descendant.

It is, however, probable that a simple gift to A. or B. would now be considered substitutional. See *Carey v. Carey*, 6 Ir. Ch. 255; see, however, *Longmore v. Broome*, 7 Ves. 128; *Miller v. Chapman*, 24 L. J. Ch. 409; *Maude v. Maude*, 22 B. 290. Whether a gift to A. or B. is substitutional.

But a gift to A. or B., or to A. or his children, as C. may appoint, is not substitutional, and in default of appointment it goes among all the appointees equally. *Penny v. Turner*, 2 Ph. 493; *White's Trusts*, Joh. 656. Gift to A. or B., as C. may appoint, is not substitutional.

A gift of £100 a-piece to each of the children, grandchildren, or other descendants of A., includes all the descendants. *Solly v. Solly*, 5 Jur. N. S. 36.

When the contingency of surviving the period of distribution is applied both to the original and substituted class; if, for instance, the gift is to parents or their children living at the decease of the tenant for life, the gift will Contingency of surviving the period of distribution

applied to original and substituted legatees. "Or" changed into "and."

nevertheless be construed as substitutional. *Congreve v. Palmer*, 16 B. 435; *Atkinson v. Bartrum*, 28 B. 219.

In such a case, however, if there is anything to show that the original and substituted class are to take co-ordinately, "or" will be read "and." *Richardson v. Spraag*, 1 P. Wms. 433, where the gift was to such of the testatrix's daughters, or daughters' children, as should be living at her son's death, "without considering any superiority or eldership whatever." See *Shand v. Kidd*, 19 B. 310; *In re Cleland's Trusts*, 7 L. R. Ir. 74.

And where the direction was to pay a sum of money after the death of a tenant for life, "to all and every the testatrix's nephews and nieces, to wit, A. or her children, B. or her children," etc., to be equally divided between them, "or" was read "and;" the words under the *videlicet* being only an expanded description of the persons to take. *Eccard v. Brooke*, 2 Cox, 213.

So, too, where the gift is to such of several persons as should be living at the testatrix's decease, or the issue of such of them as should be married, "or" will be read "and." *Horridge v. Ferguson*, Jac. 583.

Gifts to persons "then" living, or their issue.

Upon the same principle, a gift to children living at the period of distribution, or *their* issue, will be construed as a gift to children then living, and the issue of those then dead, including issue of those dead at the date of the will, but not, it would seem, of those who were dead before the testator was born. *King v. Cleveland*, 4 De G. & J. 477; *Philp's Will*, 7 Eq. 151; *Burt v. Hillyar*, 14 Eq. 160; *Wingfield v. Wingfield*, 9 Ch. D. 658.

Substitution distinguished from gift over to take place at any time.

A substitutional gift, substituting one set of legatees for others dying before the period of distribution, must be distinguished from an executory gift over intended to take effect at any time. Thus, a gift to children living at a particular time, with a gift over, if any *such* children die leaving issue to their issue, is an executory limitation to

take effect at any time. *La Roche v. Davies*, 3 Y. & C. Ex. 612, n.; *Ex parte Hunter*, 3 Y. & C. Ex. 610; *Hoves v. Herring*, 1 M'Cl. & Y. 295.

On the other hand, if the gift is to children living at the period of distribution, with a gift to their issue if any such children die before becoming entitled, the gift to the issue will be construed as substitutional, since children, living at the period of distribution, could not die without becoming entitled. *Jeyes v. Savage*, 10 Ch. 555; see *Giles v. Giles*, 8 Sim. 360.

A substitutional gift must further be distinguished from those cases where after an absolute gift to a class the shares of females, members of the class, are directed to be settled for life, with remainder to children. In the latter case the gift may possibly fail by the death of the donee before the testator. *Stewart v. Jones*, 3 De G. & J. 532; *In re Speakman*; *Unsworth v. Speakman*, 4 Ch. D. 620.

Substitution distinguished from an absolute gift with a direction to settle.

On the other hand, a substitutional gift will take effect, though the original donee dies before the testator.

Thus a direct gift to A. or his children goes to A. if he survives the testator, and to his children if he does not. *Montagu v. Nucella*, 1 Russ. 165; *Salisbury v. Petty*, 3 Ha. 86; *Whitcher v. Penley*, 9 B. 477.

Direct gift to A. or his children.

Similarly, if there is a life interest, and then a gift to A. or his children, the substitutional gift takes effect whether A. dies in the lifetime of the testator or the tenant for life. *Girdlestone v. Doe*, 2 Sim. 225; *Porter's Trusts*, 4 K. & J. 188; *Habergham v. Ridehalgh*, 9 Eq. 395; *Hobgen v. Neale*, 11 Eq. 48; see *In re Dawes' Trusts*, 4 Ch. D. 210.

Future gift to A. or his children.

As to the effect of the death of some of the original legatees before the testator:

It is settled that where the gift is to a class of parents, with a substitutional gift to the children of parents dying before the period of distribution, children of parents who

Whether substituted legatees can take for original

legatees who die before the testator's death. die after the date of the will, and before the testator, will take. *Smith v. Smith*, 8 Sim. 353; *Jones v. Frewin*, 12 W. R. 369; 3 N. R. 415; *Re Hotchkiss's Trusts*, 8 Eq. 643; *Habergham v. Ridehalgh*, 9 Eq. 395.

Case where the original class is confined to persons living at the testator's death. Though, of course, if the original gift is to a class living at the testator's death, or at some other period, and the substitutional gift is expressly confined to the children of such persons, the substitution can have no effect with regard to those who never become members of the original class. See *Shergold v. Bone*, 13 Ves. 370; *Smith v. Farr*, 3 Y. & C. Ex. 328.

Whether there can be substitution in respect of legatees dead at the date of the will :

Where the original gift is to named persons. 1. When there is a gift to several persons *nominatim*, with a substitution of their issue in the event of their death, the fact that one of the persons so named is dead at the date of the will will not prevent his issue from taking. *Hannam v. Simms*, 2 De G. & J. 151; *Ive v. King*, 16 B. 46; *Hobgen v. Neale*, 11 Eq. 48; see *Barnes v. Jennings*, L. R. 2 Eq. 448.

Where the original gift is to a class. 2. If, however, the original gift is to a class, with a substitutional gift to issue, the question is whether the issue take a share which has been given to a parent who is contemplated as capable of taking under the will, or whether they take a share which has not been previously given to their parent. In the former case, issue of parents dead at the date of the will will not take, in the latter they will.

The important point is not whether the gift itself is substitutional, but whether the interests of persons who are contemplated as capable of taking under the will are given in the event of their death to substituted legatees.

When the substituted legatees take original shares. Thus, though a gift to such of a class as may be then living, or the issue of any then dead, is strictly substitutional, the issue, if they take at all, take original shares,

since nothing is given to parents then dead. *Attwood v. Alford*, L. R. 2 Eq. 479.

In the same way a gift to parents "then living," and the issue of those then dead, is a direct substantive gift to the issue. *Smith v. Smith*, 5 Ch. 342; *Martin v. Holgate*, L. R. 1 H. L. 175; see *Ashling v. Knowles*, 3 Dr. 593; *Etches v. Etches*, 3 Dr. 447.

a. If the gift is to parents and issue in one continuous sentence—as, for instance, to children then living, and the issue of those then dead—the issue of parents deceased at the date of the will take, though the issue may be directed to take only a parent's share, as this direction will be satisfied by a stirpital distribution. *Tytherleigh v. Harbin*, 6 Sim. 329; *Rust v. Baker*, 8 Sim. 443; *Bebb v. Beckwith*, 2 B. 308; *Coulthurst v. Carter*, 15 B. 421; *Faulding's Trusts*, 26 B. 263; *Philp's Will*, 7 Eq. 151; *Hearman v. Pearce*, 7 Ch. 275.

Gifts to parents then living, and the issue of those then dead.

It seems the issue of a parent who died before the testator was born would not take. *Wingfield v. Wingfield*, 9 Ch. D. 658.

If the gift is to my children then living, and the children of such of my *said* children as shall be then dead, the testator by using the term "said" children shows that he is contemplating a class of children living at the date of the will, and capable of taking under it, and therefore children of those dead at the date of the will will not be admitted. *Re Thompson's Trust*, 2 W. R. 218; 5 D. M. & G. 280; see *Peel v. Catlow*, 9 Sim. 372; *Smith v. Pepper*, 27 B. 86; *Hall v. Woolley*, 39 L. J. Ch. 106.

Effect of the word "said."

On the other hand, if the gift is to brothers and sisters living at a particular time, and the children of such of the said brothers and sisters as should have died, and the testator has only one brother living at the date of the will, he cannot be referring to a class existing at the date of the will, and children of brothers and sisters dead at the date

of the will will be admitted. *Re Jordan's Trust*, 2 N. R. 57; *Giles v. Giles*, 8 Sim. 360; see *Jarvis v. Pond*, 9 Sim. 549.

Gift to my daughters and their children.

If the children are expressed to be the children of parents, who are beneficiaries under the will; if, for instance, the bequest is to "my daughters and their children," the children of a daughter dead at the date of the will take nothing. *Parker v. Tootal*, 11 H. L. 143; see *Crook v. Whitley*, 26 L. J. Ch. 350; but see *Clay v. Pennington*, 7 Sim. 370.

When the gift is substitutional in the simplest form.

b. When the gift is clearly substitutional, as in the case of a gift to a class or their issue, issue of members of the class dead at the date of the will will take. *In re Sibley's Trusts*, 5 Ch. D. 494; overruling *Congreve v. Palmer*, 16 B. 435.

Where such of the original legatees as are alive at the date of the will do not satisfy the words of gift.

This construction may be aided by the context. Thus, if none of the members of the original class are alive at the date of the will, or if the original class is brothers and sisters, and the testator has only one brother living at the date of the will, children of those then dead will come in. *Gowling v. Thompson*, 11 Eq. 366; see *Barnaby v. Tassell*, 11 Eq. 363; *Jarvis v. Pond*, 9 Sim. 549.

Where the gift to the substituted legatees is in an independent sentence. Direction that the legacy of a parent should go to his children.

c. Where the gift to the issue is in an independent clause, the question is whether the intention is to add fresh members to or substitute them for the original class.

If the gift is to children living at the testator's death, with a direction that if any should happen to die in his lifetime, the "legacy" intended for such child should be for his issue, the word legacy shows that the testator meant to substitute only issue of parents who at the date of the will were capable of taking. *Christopherson v. Naylor*, 1 Mer. 320; *Hunter v. Cheshire*, 8 Ch. 751. It may be doubted whether *Phillips v. Phillips*, 13 W. R. 170; 10 Jur. N. S. 1173, and *Parsons v. Gulliford*, 10 Jur. N. S. 231, can stand with these authorities.



The same rule applies if there is no direct gift to issue, but only a direction that issue of parents dying are to stand in the place of their parents, or to take their parents' share. *Butler v. Ommaney*, 4 Russ. 71; *Gray v. Garman*, 2 Ha. 268; *Atkinson v. Atkinson*, 1 R. 6 Eq. 184; *Re Hotchkiss's Trusts*, 8 Eq. 643; *Habergham v. Ridehalgh*, 9 Eq. 395; *Kelsey v. Ellis*, 38 L. T. N. S. 471.

Where the gift was to such of the children of the testator's sisters as should survive the tenant for life, followed by a direction that in case any of such children should be dead at the testator's decease leaving issue such issue should take the share of their deceased parent, the issue of a child dead at the date of the will was not included. *West v. Orr*, 8 Ch. D. 60; see *Giles v. Giles*, 8 Sim. 360.

On the other hand, if the original gift is to a class, with a direction, that the issue of any dying in the testator's lifetime, or before the period of distribution, should take the share their parents would have been entitled to if then living, the issue of those dead at the date of the will will be admitted, as the direction amounts to an independent gift, the word share being satisfied by a stirpital distribution. *Loring v. Thomas*, 1 Dr. & S. 497; *Chapman's Will*, 32 B. 382; *Adams v. Adams*, 14 Eq. 246.

This rule has been applied where the original gift was to a class living at the death of the tenant for life. *In re Woolrich*; *Harris v. Harris*, 48 L. J. Ch. 321.

In these cases it is not the share of the parents, or the share the parents are entitled to, which is given to the issue, but the share the parents would have been entitled to. *In re Potter's Trusts*, 8 Eq. 52, is a more difficult case, since there the gift was to nephews and nieces, and in case of the death of any of his *said* nephews and nieces leaving issue, such issue to take the share their parents would have taken if living, the word *said* showing

that the testator referred to nephews and nieces capable of taking under the will. See *Re Thompson's Trust*, 2 W. R. 218 ; 5 D. M. & G. 280.

Perhaps issue of parents dead at the date of the will would not be admitted where other express provision is made for such issue. *Waugh v. Waugh*, 2 M. & K. 41.

Whether the contingency of the original gift attaches to the substituted gift :

Contingency attaching to original legatees does not attach to substituted legatees.

When there is a life interest followed by a contingent gift to certain persons, and a gift if they die before the contingency to their children, the contingency attaching to the gift to the parents does not attach to that to the children, and the children take vested interests, although they may not survive the contingency upon which the gift to the parents was to take effect. For instance, if the bequest is to A. for life, then to such of my nephews as may be then living, and the children of such as may be then dead, the children take vested interests upon their parents' death, whether they survive A. or not.

Where the substituted legatees take original shares. Whether rule is the same with substitutional gifts.

1. This is clearly settled if the children take original shares. *Martin v. Holgate*, L. R. 1 H. L. 175 ; *Re Orton's Trust*, 3 Eq. 375 ; *Burt v. Hillyar*, 14 Eq. 160.

2. But if the gift to the children is substitutional there appears to be some difficulty. On the whole, the current of recent authority seems to be in favour of the same rule in the case of substitutional as of original gifts. *Masters v. Scales*, 13 B. 60 ; *Re Turner*, 34 L. J. Ch. 660 ; *Lanphier v. Buck*, 2 Dr. & Sm. 484 ; *Merrick's Trusts*, L. R. 1 Eq. 551.

But a difficulty is created by the case of *Pearson v. Stephen* in the House of Lords, 5 Bl. N. S. 203. There there was a gift to S. during coverture, and upon the death of her husband in her life to her absolutely, but if her husband should survive her, then to the testator's five sons and their respective issue *per stirpes* and not *per capita* ; and it was held that in the event of S. dying in her hus-

band's life, the sons of the testator living at such event would be absolutely entitled, but if any of the sons should die in the lifetime of S. leaving issue, such issue, if living at the death of S., would be entitled to the share their parents would have taken; but see the remarks of Kindersley, V.-C., on this case in *Lanphier v. Buck*, 34 L. J. Ch. 659.

3. There is, however, this difference between a substituted and original gift to the children, that in the former case only those children who survive the parents will take, while in the latter all the children will take, whether they survive the parents or not; but see *Humfrey v. Humfrey*, 2 Dr. & Sm. 129. "The substitution takes place at the death of the nephew or niece. And then I see very good ground for saying there by reason of its being substitution, you will not substitute dead people for the nephew or niece who has been living up to that time and has then just died." *Lanphier v. Buck*, 2 Dr. & Sm. 484; 34 L. J. Ch. 657; *Re Turner*, 34 L. J. Ch. 660; *Merrick's Trusts*, L. R. 1 Eq. 551; *Thompson v. Clive*, 23 B. 282; *Crause v. Cooper*, 1 J. & H. 207; *Bennett's Trusts*, 3 K. & J. 280; *Hurry v. Hurry*, 10 Eq. 346; *Hobgen v. Neale*, 11 Eq. 48; *Heasman v. Pearse*, 11 Eq. 522; 7 Ch. 275; *In re Haskett Smith's Trusts*, 26 W. R. 418.

Upon a similar principle, under a gift in certain events to a class and the issue of such of them as shall then be dead, members of the class dying without issue before the events happen take a share. *In re Wood*; *Moore v. Bailey*, 29 W. R. 171.

Whether the original and substituted class are mutually exclusive:

When the gift is to a class or their issue, the further question arises whether the original and substituted legatees form two mutually exclusive classes, so that no substituted legatees can take if there are any members

Substituted legatees in order to take must survive their ancestor.

Whether original and substituted legatees can take together.

of the original class to take, or whether the issue of members of the original class dying can take with the surviving members of the original class.

Where all the original legatees survive. It is clear that if all the original class survive the period of distribution, they alone take. *Sparks v. Restal*, 24 B. 218; *Margetson v. Hall*, 10 Jur. N. S. 89; 12 W. R. 334.

Where none of the original legatees survive. So, if none of the original class survive the period of distribution, the substituted legatees alone take. *Willis v. Plaskett*, 4 B. 208; *Timms v. Stackhouse*, 27 B. 434; *Bolitho v. Hillyar*, 34 B. 150; *Attwood v. Alford*, L. R. 2 Eq. 479.

Where some original legatees die. But if some of the original class die leaving children and others survive the period of distribution:

If the gift is to several persons *nominatim* as tenants in common or their children, those who survive the period of distribution take, together with the children of those who die before it. *Price v. Lockley*, 6 B. 180.

In the same way, in the case of a simple substitutional gift to children or their issue to be divided amongst them in equal shares, the issue of a child dying after the testator and before the period of distribution take with the other children. *Finlason v. Tatlock*, 9 Eq. 258; *Neelson v. Monro*, 27 W. R. 936; *In re Sibley's Trusts*, 5 Ch. D. 494; see *Holland v. Wood*, 11 Eq. 91.

When the class of substituted legatees is to be ascertained. How the class of substituted legatees is to be ascertained, when the gift is to A. for life, then to B. or his issue:—

1. If B. dies in the testator's lifetime, the class is ascertained at the testator's death. *Ive v. King*, 16 B. 46.
2. If B. survives the testator and dies in the lifetime of the tenant for life, the class is ascertained at B.'s death. *Ive v. King*, 16 B. 46; *Hobgen v. Neale*, 11 Eq. 48.

But the class is not to be definitely ascertained at those periods, but will open to let in issue born afterwards and before the period of distribution. *In re Sibley's Trusts*, 5 Ch. D. 494; *In re Jones' Estate*, 47 L. J. Ch. 775, overruling on this point *Hobgen v. Neale*, *supra*. See *ante*, p. 262.

## CHAPTER XXXVIII.

## GIFTS TO SURVIVORS.

THE word survivor may be either a word of limitation of an estate, denoting the interest certain persons are to take, or it may denote a class of persons.

Survivor  
used as a  
word of  
limitation  
of an  
estate.

For instance, in a devise to A, B, and C. as tenants in common for life, with benefit of survivorship, the word survivorship refers to the extent of the estate and not to the class of persons, and upon the death of one the remaining tenants in common take the whole estate. *Haddelsey v. Adams*, 22 B. 266; *Taaffe v. Conmee*, 10 H. L. 64.

The word cannot, of course, be a word of limitation where absolute interests are given. *Maberley v. Strode*, 3 Ves. 450; *Foley v. Gallagher*, 2 L. R. Ir. 389.

Meaning of  
survivor.

The word is, however, more usually employed to denote the persons who are to take, and in such cases it must have its natural meaning, which is to outlive; that is to say, to be alive at and after the time of a particular event or death of a particular person, which event or person the other is to survive. *Gee v. Liddell*, L. R. 2 Eq. 341. See, however, *Re Clark's Estate*, 3 D. J. & S. 111, where "survive" was held to mean merely "live after."

It has been held that a divesting clause in favour of survivors will operate in favour of a single survivor. *Hearn v. Baker*, 2 K. & J. 383; *Bowyer v. Currall*, 2 W. R. 328; *Bowyer v. Douglass*, W. N. 1876, 279.

## WHERE SURVIVORS WILL BE READ OTHERS.

1. If there is an absolute gift to several persons, with a gift to the survivors, if any die without issue, survivors must be construed in its ordinary sense. *Crowder v. Stone*, 3 Russ. 217; *Ranelagh v. Ranelagh*, 2 M. & K. 441. *Stead v. Platt*, 18 B. 50; *Greenwood v. Percy*, 26 B. 572.

Gift to several, and if any die without issue, to the survivors.

2. Where there is a gift over to take place only in case the event on which the property is limited to the first legatees, among whom there is to be survivorship, happens in respect of all the legatees, survivor will be construed other, so as not to cause an intestacy. For instance, if the bequests are to A., B., and C., payable at twenty-one, and if either die under twenty-one, his share to the survivors, and if two die under twenty-one, the whole to the survivor, and if all die under twenty-one, then over, the share of one dying under twenty-one would go to one who had predeceased him but attained twenty-one and to the survivor equally. *Wilmot v. Wilmot*, 8 Ves. 10; *In re Jackson's Trust*, 14 Ir. Ch. 472. The same construction was adopted in *In re Connellan's Trust*, 16 Ir. Ch. 524, though there was no gift over, but *quære*.

Gifts to be paid at 21, with a gift over if all die under 21.

In these cases the testator intends the property to go over as a whole, or not at all. As the whole cannot go over where the event does not happen in respect of all the first legatees, there is no other disposition of the shares in respect of which it happens except among the first legatees themselves, and, in order to allow them to take, the word survivor must be read other.

3. Where there is a devise to sons and the heirs of their bodies, and if any die without issue to the survivors and the heirs of their bodies, and if all die without issue over, survivorship will be referred to the *stirpes* and

Survivorship between tenants in tail referred to the *stirpes*.

not to the first takers, and the share of a son dying without issue will go among the issue of a son previously deceased and the surviving sons. *Doe v. Waineright*, 5 T. R. 427; *Smith v. Osborne*, 6 H. L. 376.

In such cases the testator has expressed his intention of benefiting the line of issue, and the survivorship contemplated is one between the respective *stirpes* and not between the first takers merely, and this, coupled with the gift over, which can only take effect if all the sons die without issue, is sufficient to enlarge the meaning of the word survivor.

It is immaterial whether the word is survivors or such as survive. *In re Tharp's Estate*, 1 D. J. & S. 453.

Gift over  
is not  
material.

And the same construction will be adopted even if there is no gift over to interpret the testator's intention. *Harman v. Dickenson*, 1 B. C. C. 91, see 34 B. 352; *Williams v. James*, 20 W. R. 1010; *Tufnell v. Burrell*, 20 Eq. 194.

Gifts for  
life re-  
mainder to  
issue, and  
if any die  
without  
issue, to  
the survi-  
vors for  
life, and  
then to  
their issue.

4. The same will be the case where the will gives life estates with limitations expressly to issue, followed by a gift on failure of issue of any of the tenants for life to the surviving tenants for life for their lives and then to their issue, and an ultimate gift over on failure of issue of all the tenants for life; and it makes no difference whether the gift be to survivors for life and then to their issue, or to survivors in like manner as the original shares were given. *Lowe v. Land*, 1 Jur. 377; *In re Keep's Will*, 32 B. 122; *In re Tharp's Estate*, 1 D. J. & S. 453; *Holland v. Allsop*, 29 B. 498; *Hurry v. Morgan*, L. R. 3 Eq. 152; *Badger v. Gregory*, 8 Eq. 78; *Waite v. Littlewood*, 8 Ch. 70; *In re Palmer's Trusts*, 19 Eq. 320; *Wake v. Varah*, 2 Ch. D. 348; *In re Row's Estate*, 43 L. J. Ch. 347.

There is here the same evidence of intention to benefit the issue, and the gift over shows that survivorship is



contemplated, not merely between the first takers, but between the respective *stirpes*.

5. Whether the same construction would be adopted in the absence of an ultimate gift over seems unsettled. The observations made in *Wake v. Varah*, 2 Ch. D. 348, and *Beckwith v. Beckwith*, 46 L. J. Ch. 97, are in favour of a strict construction of the word survivors under such circumstances. See, too, *Milsom v. Awdrey*, 5 Ves. 465. Whether ultimate gift over is necessary.

But the attention of the Court in those cases was not called to the cases in which a gift over has been held to be immaterial. *Hodge v. Foote*, 34 B. 349; *Re Beck's Trusts*, 16 W. R. 189; 37 L. J. Ch. 233; *In re Arnold's Trusts*, 10 Eq. 252; recently followed in *In re Walker; Church v. Tyacke*, 12 Ch. D. 205.

*Re Corbett's Trusts*, Johns. 591, may be supported on the ground that the testator expressly provided for the surviving issue of the children of the tenants for life, thus excluding an intention of also providing for children of tenants for life dying before the period of accruer, besides which the case was one in which absolute gifts were subsequently cut down by settlement.

In *Beckwith v. Beckwith* the gift was to "other daughters surviving," so that to give surviving a stirpital construction "Others surviving." would in effect have been to reject the word entirely.

If accruing shares are given to the survivors or survivor for their joint lives, and after the decease of the survivor to the children of the survivors or survivor, the surviving tenant for life will take the whole for life, though Effect of gift over after the death of the survivor. probably the children of predeceasing tenants for life would take on his death. *Winterton v. Crawford*, 1 R. & M. 407.

6. But if the gift to survivors is not given in the same manner as the original shares, there is no evidence that stirpital survivorship was intended, and the word will be construed strictly. When the gift to survivors is not subject to the

same limitations as the original gift.

Thus, where the prior limitations being for life with remainder to children, the gift is to survivors absolutely, and not to survivors for life, and then to their children, although there is a gift over of the whole upon death of all without issue, the intention to benefit the lines of issue is not sufficiently indicated, and survivors will be construed strictly. *Twist v. Herbert*, 28 L. T. N. S. 489.

Survivors must, *à fortiori*, be strictly construed where there is no gift over. *Leeming v. Sherratt*, 2 Ha. 14; *Lee v. Stone*, 1 Ex. 674; *Re Corbett's Trusts*, Johns. 591, the residuary gift. *Broune v. Rainsford*, I. R. 1 Eq. 384.

General intention to benefit stirpes.

In such a case, however, there may be a general intention expressed to benefit the *stirpes* and not merely the surviving parents; for instance, by a preliminary statement of intention that the property in question is to be divided among the children of several parents, without any mention of survivorship between the parents. *Hawkins v. Hamerton*, 16 Sim. 410.

Effect of gift to parents for life, remainder to children in tail, and if any parents die without children to the surviving parents in tail.

7. It seems when the original limitations are for life with remainder to children in tail and if any of the tenants for life die without children to the surviving tenants for life in tail, followed by a gift over in case of a total failure of issue of all the tenants for life, the stirpital construction would not be adopted. See *Maden v. Taylor*, 45 L. J. Ch. 569. See, however, *Cooper v. Macdonald*, 16 Eq. 258.

Some shares settled, others not.

8. Where the shares of some members of the class are settled and others not, and the gift over is to the survivors of the class in the same way as the original shares, the case is more difficult.

In such a case the word survivors was construed others, chiefly by the force of a gift over in default of all the objects intended to be benefited. *Lucena v. Lucena*, 7 Ch. D. 255.

Where the

If the gift is to a class of sons and daughters, and the

daughters' shares are by a separate clause directed to be settled and given over in default of issue to the surviving sons and daughters in the same way as the original shares, survivors would possibly not be construed as others. *De Garagnol v. Liardet*, 32 B. 608; *Re Usticke*, 35 B. 338; see *Nevill v. Boddam*, 28 B. 554.

On the other hand, if the shares of daughters dying without issue given to surviving members of the class are directed to be for the benefit of the other shares, survivors will be read others, at any rate as regards the settled shares. *Jackson v. Sparks*, 38 L. J. Ch. 75; and see the judgment of the M. R. in *Lucena v. Lucena*, *supra*.

9. Upon similar principles, if there is an absolute gift to several, with a gift to their issue if they die leaving issue, and if any die without issue to the survivors, subject to the same executory limitation in favour of issue as the original shares, survivorship will be referred to the *stirpes*, and not merely to the individuals. *Eyre v. Marsden*, 2 Kee. 564; 4 M. & Cr. 231; *Cross v. Maltby*, 20 Eq. 378; see *Le Jeune v. Le Jeune*, 2 Kee. 701.

But if the gift to survivors is absolute, and not subject to the same defeasibility in favour of issue as the original shares, survivors must be construed strictly, though there may be a gift over in the event of the death of all the legatees without issue. *Ferguson v. Dunbar*, 3 B. C. C. 468, *n*.

Under a gift in default of children of a daughter to the others or other of his children by name, equally between them if more than one, the word others will not be read as survivors. *In re Hagen's Trusts*, 46 L. J. Ch. 665.

Nor under a gift to a son by name and the survivors of the testator's daughters is it necessary that the son should survive in order to take. *In re Bates*, 11 W. R. 768.

# AT WHAT PERIOD A CLAUSE OF SURVIVORSHIP CEASES TO OPERATE.

In gifts to survivors two further questions arise; in the first place, when is the class of survivors to be ascertained? in the second place, when do the interests become indefeasible?

The period of distribution is the limit of defeasibility.

1. The general rule is that, when the survivorship is upon death merely, the time of distribution is the limit of defeasibility. "Survivorship is to be referred to the period of division. If there is no previous interest given in the legacy, then the period of division is the death of the testator, and the survivors at his death will take the whole legacy. But if a previous life estate be given, then the period of division is the death of the tenant for life, and the survivors at such death will take the whole legacy." *Cripps v. Woolcott*, 4 Mad. 11; *Stevenson v. Gullan*, 18 B. 590; *Neathway v. Read*, 3 D. M. & G. 18; *Howard v. Collins*, 5 Eq. 349; see *In re Duke*; *Hannah v. Duke*, 16 Ch. D. 112.

This is the case whether the only gift is in the direction to divide, as in *Cripps v. Woolcott*, or whether there is already a prior complete gift independent of that direction. *Hearn v. Baker*, 2 K. & J. 383.

The same rule applies to realty as to personalty. *In re Gregson's Trust Estate*, 2 D. J. & S. 428.

If the tenant for life dies in the lifetime of the testator the survivors are fixed at the testator's death. *Spurrell v. Spurrell*, 11 Ha. 54; *Daniell v. Daniell*, 6 Ves. 297.

Direct gift to several or the survivors.

a. Thus, in the case of a direct gift to several or the survivors, those who survive the testator take the whole. *Spurrell v. Spurrell*, 11 Ha. 54; 17 Jur. 755.

If payment is postponed till the age of twenty-one, sur-

vivorship refers to that. *Forrester v. Smith*, 2 Ir. Ch. 70; *Vorley v. Richardson*, 8 D. M. & G. 126.

b. If there is a gift for life, followed by a gift to several or the survivors, or by a gift to several, and if any die, to the survivors, those who survive the period of distribution take indefeasibly. *Cripps v. Woolcott*, 4 Mad. 15; *Whitton v. Field*, 9 B. 369; *Naylor v. Robson*, 34 B. 571; *Vorley v. Richardson*, 8 D. M. & G. 126; see *Wordsworth v. Wood*, 1 H. L. 129; see *In re Dawes' Trusts*, 4 Ch. D. 210.

Future gift to several or the survivors.

c. In the same way, if there is a gift for life and then to the children of the tenant for life who attain twenty-one and in default of such children to a class of survivors, the survivorship refers to the period when the prior gift fails. *Macdonald v. Bryce*, 16 B. 581; *Carver v. Burgess*, 18 B. 541; 7 D. M. & G. 96; *Taylor v. Beverley*, 1 Coll. 108.

Gift upon a contingency to a class of survivors.

d. Upon the same principle, a gift after a life interest to "surviving children" goes to those who survive the tenant for life. *Huffam v. Hubbard*, 16 B. 579; *Stevenson v. Gullan*, 18 B. 590; *Thompson v. Thompson*, 29 B. 654; *Neathway v. Read*, 3 D. M. & G. 18.

Gifts to "surviving" children refer to the period of distribution.

So if there are several life interests followed by a gift to a class of survivors, they are ascertained at the death of the last tenant for life. *Re Fox's Will*, 35 B. 163.

But if the class of survivors are the children of one of the tenants for life, perhaps they would be fixed at the death of their parent. *Drakeford v. Drakeford*, 33 B. 43.

And if after a gift to surviving children there is a limitation giving the shares of such of the said children who die without issue before the tenant for life to survivors, the original limitation to surviving children must refer to those who survive the testator. *Evans v. Evans*, 25 B. 81; see *Stringer v. Phillips*, 1 Fq. Ab. 293, pl. 11; 1 P. Wms. 97, n.

Contrary intention.

2. The ordinary rule may, however, be excluded by the language of the will.

Effect of powers of advancement in limiting survivorship to the testator's death.

Thus, if the testator provides for the children of legatees between whom there is to be survivorship only in case they do not survive him, or gives large powers of making advances during the lifetime of the tenant for life to legatees among whom there is to be survivorship, it may appear that survivors were to be determined at his death. *Rogers v. Towsie*, 9 Jur. 575; *Blackmore v. Snee*, 1 De G. & J. 455.

Effect of words of limitation.

And, perhaps, if the gift to survivors is followed by words of limitation, such as executors and administrators or assigns, the argument that a personal enjoyment by the survivors was not intended might prevail, and survivorship would be referred to the death of the testator. *Rose d. Vere v. Hill*, 3 Burr. 1881; *Wilson v. Bagly*, 3 B. P. C. 195.

At any rate, this would clearly be the case if the gift is after a life interest to surviving children, or their heirs and assigns, where the substitutional gift shows that vested interests were intended to be taken at the testator's death. *Re Hopkins' Trust*, 2 H. & M. 411.

Gifts to be paid at 21, after a life interest, with benefit of survivorship.

3. If there is a life interest and a period of division as well, for instance, a gift to A. for life, then to a class to be paid at twenty-one, with a clause of survivorship, the question is more complicated. In such cases survivorship refers most naturally to the words with which it is placed in immediate connection.

a. Therefore, if the gift is after a life interest to a class to be paid at twenty-one with benefit of survivorship, survivorship refers most naturally to the age of twenty-one just before mentioned. *Tribe v. Newland*, 5 De G. & S. 236; *Knight v. Knight*, 25 B. 111; *Forrester v. Smith*, 2 Ir. Ch. 70; *Berry v. Briant*, 2 Dr. & Sm. 1; *Corneck v. Wadman*, 7 Eq. 80.

This construction is assisted by a gift over upon death of all under twenty-one. *Salisbury v. Lamb*, 1 Ed. 465; *Amb.* 383; *Bouverie v. Bouverie*, 2 Ph. 349; *Alty v. Moss*, 34 L. T. N. S. 312. Effect of a gift over upon death of all under 21.

On the other hand, it is rebutted if the gift over is upon death of all before the tenant for life. *Daniell v. Gossett*, 19 B. 478; *Fisher v. Moore*, 1 Jur. N. S. 1011; see, too, *Doe d. Lifford v. Sparrow*, 13 East, 359; *Gummoe v. Howes*, 23 B. 184, 192. Gift over upon death before the tenant for life.

b. If, however, the direction as to payment is independent of the gift to survivors, the ordinary rule prevails; if, for instance, the gift is to surviving children at twenty-one. *Huffam v. Hubbard*, 16 B. 579; *Pope v. Whitcombe*, 3 Russ. 124; *Crozier v. Fisher*, 4 Russ. 398; *Lill v. Lill*, 23 B. 446; *Daniell v. Gossett*, 19 B. 478. Where the ordinary rule prevails.

4. If the gift to survivors is upon death without issue and the bequest is immediate, those surviving the testator would possibly take indefeasibly in the absence of a contrary intention. See *Bowers v. Bowers*, 5 Ch. 244; and the remarks of V.-C. Malins on that case, 11 Eq. 231; and see *ante*, p. 486. When the gift to survivors is upon death without issue.

And apparently the same rule will apply if there is a life interest. *Ingram v. Soutten*, L. R. 7 H. L. 408.

#### WHEN THE CLASS OF SURVIVORS IS TO BE ASCERTAINED.

1. In the class of cases last mentioned where the gift is upon death without issue, the survivors are ascertained whenever the event, upon which the shares are given over, occurs. *Leeming v. Sherratt*, 2 Ha. 14; *Nevill v. Boddam*, 28 B. 554; *Maden v. Taylor*, 45 L. J. Ch. 569. When the gift is upon death without issue, the survivors are ascertained

2. Whether the last survivor would take indefeasibly seems doubtful. when the event happens.

It has been held that when interests are given to several persons for life with remainder to their children, Whether the last survivor

takes inde- and in the event of any of them dying without issue, the  
feasibly. shares of those so dying are given to the survivors abso-  
lutely, in the event of the last survivor dying without  
issue, such last survivor will take his share absolutely, the  
share being carried back to him by the survivorship clause.  
*Maden v. Taylor*, 45 L. J. Ch. 569. The difficulty of this  
construction is that it reads survivors in two different  
senses. The share of a legatee dying without issue and  
leaving several survivors would go to them—that is to  
say, to those who survive the event; on the other hand,  
the share of the last surviving legatee dying without issue  
is carried back to him not as surviving the event, but as  
the longest liver. See, too, *Re Corbett's Trusts*, Joh. 591.

Whether when the period of defeasibility is expressly limited by the testator, survivors are ascertained when the event happens, or when the shares become indefeasible. When there is no vested gift. 3. In those cases where the period of defeasibility, or the period during which the gift to survivors is to take effect is limited, another difficulty arises with regard to the time at which the class of survivors is to be fixed. The question is whether the shares of those dying go over immediately to survivors, or whether only those can take as survivors who survive the period of defeasibility.

a. If there is no vested gift, but only a gift to survivors after a life interest, or upon a contingency, there is no difficulty, and the class to take is ascertained at the time of division, or when the contingency happens. *Howard v. Collins*, 5 Eq. 349; *Carver v. Burgess*, 18 B. 541; 7 D.M. & G. 96; *Pritchard's Trusts*, 3 Dr. 163.

Divesting gift to survivors upon death merely. b. When there is a vested gift with a divesting clause in favour of survivors upon death merely, as, for instance, to a class and if any die to the survivors, the class to take will be ascertained at the time when the shares become indefeasible, that is to say, at the time of distribution, so that if there are no survivors at that time the original gifts are not divested. *Cambridge v. Rous*, 25 B. 409.

Gift to c. But when the gift is to a class, with a gift to sur-



vivors, if any die before the tenant for life or before the period of distribution, so that no question as to the period of defeasibility can arise:

(i.) If the gift is direct to be paid at twenty-one and if any die under twenty-one to the survivors as tenants in common, the current of authority seems to show that the share of a legatee dying under twenty-one will go to those who survive him, though such survivors may not survive the period of distribution, or even the testator where the gift is to individuals, in which latter case the accrued share will lapse. *Ex parte West*, 1 B. C. C. 575; *Rickett v. Guillemard*, 12 Sim. 88; see, too, *Rudge v. Barker*, Ca. temp. Talb. 124, and cases there cited; *Worlidge v. Churchill*, 3 B. C. C. 465; *Pain v. Benson*, 3 Atk. 80; *Sillick v. Booth*, 1 Y. & C. C. 121, 739; *Bardon v. Bardon*, 16 Ir. Ch. 415; see *Wakefield v. Dyott*, 7 W. R. 31; 4 Jur. N. S. 1098.

(ii.) If the gift is after a life interest to several and if any die before the tenant for life to the survivors as tenants in common, it appears to be now settled that survivors means those who survive the tenant for life, and therefore those who survive the tenant for life will take the whole, while, on the other hand, if none survive the tenant for life the prior interests are not divested. *Littlejohns v. Household*, 21 B. 29; *Marriott v. Abell*, 7 Eq. 478; see *Hunter's Trusts*, L. R. 1 Eq. 295. *Bright v. Rowe*, 3 M. & K. 316, if *contra*, must be considered overruled. It may, however, perhaps be classed under the preceding head, as the disposition was not of a fund in possession to a tenant for life with remainder, but of a reversionary fund subject to a prior life interest, to be paid upon its falling in. See, too, *Vorley v. Richardson*, 8 D. M. & G. 126.

(iii.) The testator may, however, show that he intended

survivorship will be among the legatees.

survivorship to be between the legatees, and not to have reference to the period of distribution.

If, for instance, the gift is to A. for life, and then to B. and C. equally, and if either die in A.'s life to the survivor of them the said B. and C., *his executors, administrators, or assigns*, there is a strong indication that the survivorship intended was between B. and C., and, therefore, upon B.'s death in A.'s life, C. immediately becomes entitled in remainder to the whole. *White v. Baker*, 2 D. F. & J. 55.

d. If the gift is if any die without issue before the period of distribution to survivors, the point seems to be more doubtful.

Gift to survivors if any legatees die without issue before the period of distribution.

When there is a gift to the issue if any die leaving issue.

(i.) If there is a gift in the event of any dying before the period of distribution leaving issue to such issue, and if any die before the period of distribution without issue to the survivors, since the gift to the issue takes effect upon the death of the parent, survivorship refers to the same point of time, namely, the death of the person dying without issue. *Ive v. King*, 16 B. 46; *Eyre v. Marsden*, 2 Kee. 564; 4 M. & Cr. 231; *Wilmott v. Flewitt*, 13 W. R. 856; 11 Jur. N. S. 828.

Where the original gift is to a class living at the period of distribution.

Where the whole fund is to be divided once for all.

(ii.) On the other hand, if the original gift is to a class living at the period of distribution, it seems more natural to refer the survivorship to the same period. *Essex v. Clement*, 30 B. 525.

(iii.) And, perhaps, the same will be the case where the gift is not of the shares of those dying before the period of distribution without issue to survivors, but the whole fund is directed to be divided in the event of any dying before the period of distribution among the survivors, implying that the whole fund is to be kept together till the period of distribution, and then divided among a class of persons capable of personal enjoyment. *Watson v. England*, 15 Sim. 1. See *Re Johnson's Trusts*, 10 L. T. N. S. 455.

(iv.) Where there are none of the indications of intentions above mentioned, it seems doubtful what the rule would be. *Crowder v. Stone*, 3 Russ. 217; and *Young v. Robertson*, 4 Macq. 314, appear to be in direct conflict on the point, and the latter being a Scotch case, it is difficult to say how far its authority would be followed, especially as it is in other respects not entirely in harmony with the current of English authority. As far as principle or convenience goes the arguments seem to be fairly balanced.

A gift over upon death without issue means death without issue at any time, in the absence of an indication of intention to limit the period of defeasibility. The class of survivors, therefore, would have to be fixed whenever the contingency happens, and there seems no reason for saying that the mere limiting of the period of defeasibility should introduce a contingency into the bequest to survivors and make the gift of accruing shares conditional upon surviving the period of defeasibility.

The gift over to survivors, being upon death without issue, it is the failure of issue of members of the original class which is the leading motive in the testator's mind, and not death before the period of enjoyment. The share is given to survivors not because the original members of the class do not live to enjoy it, but because they have no children to benefit. The intention is to benefit not only the original class but their children, whereas, if the survivors are not fixed till the time when the shares become indefeasible, children of such members of the original class as die before that time will take no interest in the shares of those who die without issue, an argument which, as already remarked, becomes conclusive if there is a prior gift to the children of those who die leaving children.

On the other hand, if the shares go over at once, and

several die without issue in the lifetime of the tenant for life, the representatives of the longer lived will take more than the representatives of those dying previously, while the representatives of the person dying first will take nothing, and it may be said that this can hardly have been the testator's intention; but he would probably have provided for such a contingency if he had contemplated it, and his omission to do so ought not to affect the construction of the will.

On the whole, however, it must be admitted that the balance of recent authority is in favour of the principle adopted in *Young v. Robertson*. See the opinion of the V.-C. Malins, 7 Eq. 483, 484.

Case when the period of defeasibility is constructively limited.

d. What the case would be when, the gift being upon failure of issue of any of the legatees to the survivors, the Court limits the period of defeasibility by construction to the lifetime of the tenant for life, there is no authority to show. In such a case it would seem the argument above mentioned in favour of immediate accruer would apply with greater force, as the period of defeasibility is only remotely present to the testator's mind.

#### ACCRUED SHARES.

Accrued are not subject to the defeasibility of original shares without express words.

Clauses in a will disposing of the shares of devisees and legatees dying before a given period or event, do not without a positive and distinct indication of intention extend to shares which have once accrued under those clauses so as to pass them a second time. *Ex parte West*, 1 B. C. C. 575; *Melsom v. Giles*, L. R. 5 C. P. 614; *ib.* 6 C. P. 532; *ib.* 6 H. L. 24.

Therefore accrued shares will not pass under the word share or portion. *Cambridge v. Rous*, 25 B. 416; *Bright v. Rowe*, 3 M. & K. 316.

But accrued shares will go with original shares if there is an intention expressed that they should do so.

1. If, for instance, accrued shares are directed to go in the same manner as original shares. *Cursham v. Newland*, 2 B. 145; *Milsom v. Awdry*, 5 Ves. 465; *Eyre v. Marsden*, 4 My. & Cr. 231; *Melsom v. Giles*, L. R. 6 H. L. 24.

Accrued shares directed to go as original shares.

2. And when original and accrued shares have once been consolidated by a direction, for instance, that they are to go in the same manner, "there is no occasion to carry on any separate account of the original share from the accrued share," and both will pass under the word share. *Re Hutchinson*, 5 De G. & S. 681.

Consolidation of original and accrued shares.

3. If "his or her share or shares" are spoken of where only one original share has been previously given, so that the words cannot be satisfied *reddendo singula singulis*, as might be the case if the words were "his, her, or their, share or shares," accrued shares will be carried over. *Wilmott v. Flewitt*, 13 W. R. 856.

Words applicable to accrued shares.

And, apparently, "share and shares and interest," would carry accrued shares. *Douglas v. Andrews*, 14 B. 347.

4. Accrued shares will pass where the testator, though he speaks of individual shares, yet shows that he looks on the fund as existing at the period of distribution as an aggregate and previously undivided fund by speaking of it, for instance, as the trust fund. *Worlidge v. Churchill*, 3 B. C. C. 465; *Leeming v. Sherratt*, 2 Ha. 14; *Sillick v. Booth*, 1 Y. & C. C. 121, 739; *Barker v. Lea*, T. & R. 413.

Where the fund is treated as an aggregate fund.

So, where the whole fund is given to a class, with benefit of survivorship, the words of survivorship apply to the whole, accrued as well as original shares. *In re Crawhall's Trusts*, 2 Jur. N. S. 892.

5. And a gift over of the whole is convincing evidence Gift over

of the  
whole  
fund.

of the same intention. In such a case "share must have been meant to include every interest accruing as well as original, for otherwise the estate would go away from the issue piecemeal; whereas, it is obvious, nothing was intended to go over, but that all should go over at once on failure of the issue of all the children, as if all but one had died without issue who was intended to take all." *Doe d. Clift v. Birkhead*, 4 Ex. 110; *Douglas v. Andrews*, 14 B. 347; *Dutton v. Crowdy*, 33 B. 272; *Langley v. Langley*, 6 L. R. Ir. 277.

Where the  
gift is  
residuary.

6. And if the bequest is of residue, the presumption against intestacy will assist the Court in passing accrued with original shares. *Goodman v. Goodman*, 1 De G. & Sm. 695.

Accrued  
shares are  
*prima*  
*facie* not  
subject to  
the restric-  
tion of  
original  
shares.

7. Accrued shares are similarly not liable to the same restrictions as original shares in the absence of a clearly expressed intention so to restrict them. *Gibbons v. Langdon*, 6 Sim. 260; *Ware v. Watson*, 7 D. M. & G. 248; and, on the other hand, *Trickey v. Trickey*, 3 M. & K. 560; *Jarman's Trusts*, L. R. 1 Eq. 71; *Fitzgerald v. Fitzgerald*, I. R. 7 Eq. 436.

## CHAPTER XXXIX.

## THE CONSTRUCTION OF GIFTS OVER.

## GIFTS OVER UPON DEATH BEFORE VESTING.

A GIFT over of the share of a legatee who dies before attaining a vested interest takes effect if the legatee dies in the lifetime of the testator, whether under or over the age appointed for vesting. *Re Gaitskell's Trusts*, 15 Eq. 386.

Gift over upon death before vesting.

A gift over upon the death of the legatees before attaining a vested interest refers *prima facie* to death before vesting in interest.

Vesting *prima facie* refers to vesting in interest.

This is the case whether the gift be immediate or in remainder. *Parkin v. Hodgkinson*, 15 Sim. 293; *Re Arnold's Estate*, 33 B. 163; *Richardson v. Power*, 19 C. B. N. S. 780.

If, however, the gift over be to persons living at the period of distribution, there is a strong argument that the word vested was used as equivalent to vested in possession: *Young v. Robertson*, 4 Macq. 314, where the gift over upon the death of any before attaining a vested interest was to the survivors, which was read as equivalent to those who survive the period of distribution, and *Greenhalgh v. Bates*, L. R. 2 P. & D. 47, where the gift over was to the next of kin of the tenant for life, who could not be ascertained till her death.

When the gift over to persons living at the period of distribution.

So, if the legacies would be vested in interest at the testator's death, and the gift over is, if any of the legatees

die during the testator's life, or after his decease, without attaining vested interests, vested must mean vested in possession. *King v. Cullen*, 2 De G. & S. 252.

Vested  
used as  
equivalent  
to paid.

And, in the same way, the testator may show that he used "vested" in the gift over, as equivalent to "paid," if the gift over is, if any die before their share should be vested as aforesaid, when only directions as to payment have been previously given. *Sillick v. Booth*, 1 Y. & C. C. 121, 126.

If the testator expressly provides for the death of the legatees in his lifetime, a gift over upon death before vesting refers to vesting in possession. *In re Morris*, 5 W. R. 423.

#### GIFTS OVER UPON DEATH BEFORE PAYMENT.

Gift over  
upon death  
before pay-  
ment after  
an imme-  
diate gift  
with a  
period of  
payment.

A. In the case of a direct gift, followed by a gift over, if any of the legatees die before their legacies are payable.

1. If a period for payment is appointed the gift over takes effect:

a. If the prior legatee dies in the testator's lifetime, whether after the age fixed for payment or not. *Walker v. Main*, 1 J. & W. 1; *Gaitskell's Trust*, 15 Eq. 386.

b. If the prior legatee survives the testator, but dies before the time fixed for payment. *Jenkins v. Jenkins*, Belt's Supplement, 264; *Rammell v. Gillow*, 9 Jur. 704; and see *Woodburne v. Woodburne*, 3 De G. & S. 643.

Where no  
period for  
payment is  
appointed.

2. If no time is fixed payable refers to the testator's death. *Rammell v. Gillow*, 9 Jur. 704; *Collins v. Macpherson*, 2 Sim. 87; *Cort v. Winder*, 1 Coll. 320.

Gift over  
upon death  
before pay-  
ment  
where  
there is a

B. If there is a life interest, followed by a bequest to certain persons, and a gift over in the event of death before the respective legacies become payable, no time being appointed for division or payment, the gift over



takes effect with respect to those legatees who die before the tenant for life. *Crowder v. Stone*, 3 Russ. 217; *Creswick v. Gaskell*, 16 B. 577.

The word entitled, however, is more easily susceptible of the meaning vested than the word payable, and it will accordingly be taken to mean entitled in right and not in possession, and referred to the death of the testator and not of the tenant for life, if the latter meaning would have the effect of divesting a previously vested gift. See *Commissioners of Charitable Donations v. Cotter*, 2 D. & Wal. 615; 1 D. & War. 498; *Henderson v. Kennicott*, 2 De G. & S. 492. See *Beale v. Connolly*, I. R. 8 Eq. 412; *Jopp v. Wood*, 28 B. 53; 2 D. J. & S. 323.

C. If there is a life interest as well as a period of payment the question is more complicated.

The most numerous cases on this head have occurred in marriage settlements, where, in addition to the leaning in favour of vesting, the Court is assisted by the legal presumption that the children were intended to be provided for at the time when their portions were wanted, whether they survived the tenant for life or not. See *Emperor v. Rolfe*, 1 Ves. sen. 208.

The same rules of construction are however applicable to wills. At the same time it must be remembered that the tendency of the Court at the present day is to give words their natural meaning, and it is probable that many of the old authorities cited below would not now be followed. The cases may be classified under the following heads:—

1. If there is a gift to A. for life, followed by a bequest to his children, whether at twenty-one, or payable at twenty-one, with a gift over on death before the legacy is payable, the gift over is good as regards legatees who die in the testator's lifetime, whether under or over twenty-one. *Walker v. Main*, 1 J. & W. 1; the share of Mary

life interest.

Meaning of the word "entitled."

Effect of gift over upon death before payment when there is a life interest and a period of payment.

Effect of the death of the legatee before the testator.

Main, who it appears had attained twenty-one. See *Gait-skill's Trust*, 15 Eq. 386.

Bequest  
contingent  
upon  
attaining  
21 is in-  
defeasible  
at that age.

2. If there is a gift to A. for life followed by a contingent bequest to his children, as, for instance, to the children at twenty-one, or to be vested at twenty-one, and a gift over in the event of death before the shares are payable, if the word payable were taken in its ordinary meaning as referring to the time at which the money is actually distributable, it would involve the double contingency of surviving the tenant for life and attaining twenty-one, and therefore the Court confines it to the latter, which is the event when the bequest is most likely to be required, and this is the case whether there is provision for the issue of the children or not. *Mendham v. Williams*, L. R. 2 Eq. 396; *Mocatta v. Lindo*, 9 Sim. 56; *Jones v. Jones*, 13 Sim. 561; *Bouverie v. Bouverie*, 2 Ph. 349.

The same will be the case whether the word used is "received" or "receivable:" *West v. Miller*, 6 Eq. 59; *Dodgson's Trust*, 1 Dr. 440; or "entitled in possession," or "entitled to the receipt," or "entitled to payment," or "before they have received or become possessed." *Re Yates' Trust*, 21 L. J. Ch. 281; *Haward v. James*, 28 B. 523; *Re Williams*, 12 Beav. 317; *Rammell v. Gillow*, 9 Jur. 704.

Effect of  
gift over  
to issue of  
those dying  
before the  
time of  
payment,  
when the  
shares are  
to be  
vested at  
marriage.

3. When the shares of daughters are directed to be vested at twenty-one, or marriage, and there is a gift over, if any of the legatees die before their shares are payable to their issue, there seems to be some doubt whether it would not be necessary to construe "payable" in its ordinary meaning, since a daughter could not die leaving issue before her share becomes payable if "payable" meant "vested."

It seems, however, that if the gift over is simply of the shares of legatees who die before the time of payment,

the construction would not be affected by this fact. *Mendham v. Williams*, L. R. 2 Eq. 396.

On the other hand, if the gift over is not simply of their shares, but of the shares to which the parents would have been entitled if living, since the parents would have been entitled to nothing unless they survived the period of vesting, and the daughters could not have had issue without taking vested shares, payable will have its literal meaning. *Day v. Radcliffe*, 3 Ch. D. 654.

Probably, however, *Mendham v. Williams* and *Day v. Radcliffe* cannot stand together.

4. Where the gift to the children is vested at birth and payment only is postponed, and there is no provision for the issue of the children and a gift over in the event of death before the shares become payable: as, for instance, to A. for life and then to his children, to be divided at twenty-one, with a gift over if any die before their shares are payable, in this case payable will be held to mean attaining twenty-one, for otherwise the issue of those children would not take who died in the lifetime of the tenant for life over twenty-one. *Hallifax v. Wilson*, 16 Ves. 168; *Walker v. Main*, 1 J. & W. 1; *Salisbury v. Lamb*, 1 Ed. 465; *Re Williams*, 12 B. 317; *Hayward v. James*, 28 B. 523.

The construction will be the same where the issue only of such children are provided for as die under twenty-one. *Mocatta v. Lindo*, 9 Sim. 56.

If, however, there is after a bequest for life a bequest to children vested at their births, and the time of division is alone postponed with provision for the issue of children dying at any time during the life of the tenant for life, and a gift over if they die before the legacies become payable, the word payable will bear its ordinary meaning and refer to the death of the tenant for life.

For instance, if the gift be to A. for life, then to her

Where there is a vested gift to be paid at 21.

When the issue of those dying before the period of distribution are provided for in all events.

children, to be transferred to them at twenty-one, and if any die before their shares are payable, leaving issue, to such issue, and if any die before their shares are payable without issue over, since the fund becomes actually payable on the death of the tenant for life, and there is no reason to adopt any other construction in order to favour the issue, who are already provided for, the gift over will be good on the death of the legatees during the life of the tenant for life, though they may have attained twenty-one. *Willmott's Trust*, 7 Eq. 532; *Chell v. Chell*, 23 W. R. 252.

Effect of the collocation of words upon the construction.

It may, however, be noticed that the construction of payable, as meaning attaining twenty-one, especially in cases under the first head, is materially assisted by such words as "to be paid," or "payable" at twenty-one, and "it is no strain to understand the testator as adverting merely to the age of twenty-one, which he had just before appointed as the period of payment." *Hallifax v. Wilson*, 16 Ves. 168.

When the original gift is contingent upon surviving the tenant for life, "payable" bears its ordinary meaning.

5. If the death of the tenant for life is the earliest period at which the gift can be payable; if, for instance, the gift is to such as survive the tenant for life, to be paid at twenty-one, with a gift over upon death before the shares become payable; the word payable would in all probability receive its ordinary meaning and be referred to the period of distribution. *Bielefield v. Record*, 2 Sim. 354.

#### GIFTS OVER UPON DEATH BEFORE ACTUALLY RECEIVING THE LEGACY.

Gift to persons living at the testator's death,

When it is clear that the testator refers only to legatees living at his death and there is a gift over if any die before their shares are payable or before receiving their

shares, the gift over cannot refer to death in the lifetime of the testator. V.-C. Kindersley, in such a case, held that the gift over was good with regard to the shares of those who died within a year after the testator's death; but, apparently, in such a case, the Court would inquire at what time the money might have been paid. *Arrow-smith's Trusts*, 29 L. J. Ch. 775; 6 Jur. N. S. 1231; on appl., 2 D. F. & J. 474.

In the same way under an immediate bequest with a gift over upon death "before me or before the division of my estate," the gift over takes effect upon the shares of legatees dying within a year from the testator's death. *In re Collison*; *Collison v. Barber*, 12 Ch. D. 834.

If, however, the gift over is in the event of death before the legacy is actually paid or received, there is some doubt whether the gift over will take effect. See *Hutcheon v. Mannington*, 1 Ves. jun. 366; 4 B. C. C. 491; *Martin v. Martin*, L. R. 2 Eq. 404; *Minors v. Battison*, 1 App. C. 429.

According to the earlier authorities, which have not been unanimously followed, it seems that, though the Court will be unwilling to put upon any words a meaning which would divest a previously vested gift if the legatee dies before actually receiving it, nevertheless, where such an intention is clearly expressed, effect must be given to it. See *Gaskell v. Harman*, 11 Ves. p. 497:

"If a testator thinks proper, whether prudently or not, to say distinctly, showing a manifest intention, that his legatees, pecuniary or residuary, shall not have the legacies or the residue, unless they live to receive them in hard money, there is no rule against such intention, if clearly expressed. But that would open to so much inconvenience and fraud, that the Court is not in the habit of making conjectures in favour of such an intention. In the case of *Hutcheon v. Mannington*, I admit, I thought the meaning

with a gift  
over upon  
death  
before  
payment.

Gift over  
upon death  
before  
actual  
receipt.

of those words was, what they shall have received ; and I thought so even after the decision. The use I have since made of that case is as an authority, that, if the words will admit of not imputing to the testator such an intention, it shall not be imputed to him." See, too, *Sitwell v. Bernard*, 6 Ves. 535.

Thus, for instance, as already noticed, death before receiving will not mean before actually receiving, but before being entitled to receive. See, too, *Whiting v. Force*, 2 B. 571 ; and see *In re Kirkbride's Trusts*, L. R. 2 Eq. 400.

On the other hand, if the intention is clearly expressed the legacy will be divested if the legatee dies before actually receiving payment. *Whitman v. Aitken*, 2 Eq. 414 ; *Johnson v. Crook*, 12 Ch. D. 639. See, however, *Martin v. Martin*, *supra* ; *Minors v. Battison*, *supra* ; *Bubb v. Padwick*, 13 Ch. D. 517.

Death  
before sale  
completed.

In the same way if there is a gift upon trust for sale and division among certain legatees, a gift over if any die before the sale is completed is valid. *Faulkener v. Hollingworth*, cit. 8 Ves. 559 ; *Elwin v. Elwin*, 8 Ves. 547 ; see *Bernard v. Montague*, 1 Mer. 433 ; see 11 Ves. 508.

Negligence  
of executor  
will not  
prejudice  
the legatee.

But even when the gift over is upon death before actual receipt, the negligence of an executor will not be allowed to prejudice the legatee, and an inquiry will be directed as to the time at which, with reasonable diligence, the legacy ought to have been paid. *Law v. Thompson*, 4 Russ. 92.

Death  
before  
execution  
of trusts.

A gift over upon death before the execution of the trusts of the will is void. *Roberts v. Youle*, 49 L. J. Ch. 744.

GIFTS OVER UPON DEATH UNMARRIED AND WITHOUT  
ISSUE.

1. In a gift over upon death unmarried without any explanatory context, unmarried means never having been married. *Dalrymple v. Hall*, 29 W. R. 421. Unmarried.

2. Where vested interests are given at twenty-one or marriage, a gift over upon death unmarried and without issue will mean never having been married. *Heywood v. Heywood*, 29 B. 9; *Pratt v. Matthew*, 8 D. M. & G. 522; *Gonne v. Cooke*, 15 W. R. 576. Gift over upon death unmarried and without issue when vested interests are given upon marriage.

3. And, perhaps, the same construction would be adopted where the gift is to A. simply and if he dies unmarried and without issue over; the argument in favour of the construction being that A.'s interest would then be indefeasible upon his marriage. See *Heywood v. Heywood*, *supra*; see *In re Saunders' Trusts*, 3 K. & J. 152; *Radford v. Willis*, 7 Ch. 7.

The case of *Doe d. Baldwin v. Rawding*, 2 B. & Ald. 441, is not opposed to this view, since the donee there left a husband surviving her, so that upon no construction of unmarried could the gift over take effect. The point did not arise in *Bell v. Phym*, 7 Ves. 450.

4. Of course, if the legatee were married at the date of the will this construction would be impossible.

In *Crosthwaite v. Dean*, 5 Eq. 245, a gift over of a fund in case the legatee should marry or die unmarried, where the legatee was married at the date of the will and of the testator's death, but her husband was believed to be dead, was held to refer to a second marriage. See, too, *Lepine v. Bean*, 10 Eq. 160; *Smith v. Charles*, 13 W. R. 224. Unmarried may refer to a second marriage.

5. If the gift is to A. for life, remainder to his children, and if A. dies unmarried and without issue over, un- Gift over upon death unmarried

and with- married will be read as equivalent to not having a wife at  
out issue his death. To read it as never having been married  
after a would increase the chance of intestacy, since in that case,  
prior gift to the if A. married and had no children, the gift over would  
legatee for life, and not take effect; and, again, the word unmarried would be  
then to his mere surplusage. *Doe d. Everett v. Cooke*, 7 East, 269;  
children. *In re Sanders' Trusts*, L. R. 1 Eq. 675.

### "AND" CHANGED INTO "OR" IN GIFTS OVER.

Devise to 1. If there is a devise to A. in fee and if he dies under  
A. in fee, twenty-one and without issue over, "and" will not be  
and if he read "or." To do so would have the effect of divesting  
dies under a prior devise in events other than those mentioned.  
21 and *Malcolm v. Malcolm*, 21 B. 225; *Coates v. Hart*, 32 B.  
without issue over. 349; 3 D. J. & S. 504.

And, similarly, a gift to A. for life, and then to her children, and if she dies under twenty-one and without children over, will not be construed as if it were under twenty-one or without children. *Key v. Key*, 1 Jur. N. S. 372.

Devise to 2. If the devise is to A. in tail and if he dies under  
A. in tail, twenty-one and without issue over, "and" will not be read  
and if he "or." *Grey v. Pearson*, 6 H. L. 61, and *Doe d. Usher v.*  
dies under *Jessep*, 12 East, 288; overruling *Brownsword v. Edwards*,  
21 and 2 Ves. sen. 243, so far as it is an authority on this point.  
without issue over. In this case there is reason for contending that the devise  
over ought to be read as equivalent to "if he dies under  
twenty-one or at any time without issue," since the estate  
would take effect as a remainder after an estate tail; but  
this would deprive the issue of any benefit if the devisee  
died under twenty-one leaving issue, unless the devise  
were read under twenty-one without issue, or at any time  
without issue, involving a very considerable alteration of  
the words of the will.



This latter construction, however, would perhaps be adopted if the original devise in tail were made contingent upon the devisee attaining twenty-one or having issue.

*Brownsword v. Edwards*, 2 Ves. sen. 243.

3. A different question arises where the gift over is upon two events, one of which includes the other, as "if A. dies unmarried and without children."

Gift over upon two events, one of which includes the other.

If the gift is to A. for life and then to his children absolutely, so that if A. has no children there would be an intestacy, there are three possible constructions :

a. If possible, unmarried will be held to mean unmarried at the time of death, and it is then unnecessary to change "and" into "or." *Doe v. Rawding*, 2 B. & Ald. 441; *Doe d. Everett v. Cooke*, 7 East, 269; *In re Sanders' Trusts*, L. R. 1 Eq. 675; see *ante*, p. 527.

Unmarried if possible will mean not married at the death.

The same is the case if unmarried means "not married by consent." *Dillon v. Harris*, 4 Bl. N. S. 321.

b. If, however, it is clear that unmarried must mean never having been married, it seems doubtful whether "and" will now be changed into "or." According to the earlier cases, there is no doubt that the change would be made. *Wilson v. Bayley*, 3 B. P. C. 195; *Hepworth v. Taylor*, 1 Cox, 112; *Maberley v. Strobe*, 3 Ves. 450; *Bell v. Phyn*, 7 Ves. 453.

If unmarried must mean never married, "and" will be changed into "or."

These cases are, however, of doubtful authority, since the term "unmarried" would probably now in all similar cases be held equivalent to "not married at the death."

The question in *Grey v. Pearson*, 6 H. L. 61, was so different that it can hardly be said to have any bearing upon this point.

c. But if the gift is to A. absolutely, and if he dies before marriage and without children over, "and" will not be read "or," as to do so would be to increase the defeasibility of interests already completely disposed of in all events. *Seccombe v. Edwards*, 28 B. 440.

Gift over after an absolute interest, if the legatee dies before marriage and without issue.

"And" will not be changed into "or" where the gift over is upon death in the testator's lifetime, and before receiving any benefit. *In re Kirkbride's Trusts*, L. R. 2 Eq. 400.

Gift over upon two independent events.

4. Where the two events upon which the gift over is made to depend are independent of each other, there can be no reason for changing "and" into "or." *Day v. Day, Kay*, 703; *Reed v. Braithwaite*, 11 Eq. 514; see *Barker v. Young*, 33 B. 353.

#### CHANGE OF "OR" INTO "AND" IN GIFTS OVER.

Gift over upon death under age or without lawful issue.

1. If there is a devise to A. in fee if she dies leaving lawful issue, but if she dies under age or without lawful issue over, "or" will be read "and." *Johnson v. Simcock*, 6 H. & N. 6; 9 W. R. 895.

2. If the devise is to A. in fee, and if he dies under twenty-one or without issue over, "or" will be read "and," to favour the issue of A. *Fairfield v. Morgan*, 2 B. & P. N. R. 38; *Denn d. Wilkins v. Kemeys*, 9 East, 366; *Eastman v. Baker*, 1 Taunt. 174; *Morris v. Morris*, 17 B. 198.

3. If the devise is to A. for life, remainder to his children in tail, and if A. dies under twenty-one or without children over, it is doubtful whether "or" would be read "and." According to the earlier authorities, the change would be made. *Hasker v. Sutton*, 1 Bing. 501; 9 J. B. Moo. 2; but see *Cooke v. Mirehouse*, 34 B. 27.

Gift over upon failure of issue or some other event.

4. And where, after a prior absolute gift, the gift over is upon failure of issue or some other event, such as not making a will, "or" will be read "and," though the gift over may thereby become void. *Incorporated Society v. Richards*, 1 D. & War. 258; *Greated v. Greated*, 26 B. 621; *Green v. Harvey*, 1 Ha. 428.

5. But if the devise is to A. in tail and if he dies under twenty-one or without issue over, "or" will not be construed "and;" though, on the other hand, it seems that if the devisee died under twenty-one leaving issue, the gift over would not be held to have taken effect, so that the devise would, in fact, be construed as equivalent to "if A. dies under twenty-one without issue or without issue at any time." *Mortimer v. Hartly*, 6 Ex. 47; *Soulle v. Gerard*, Cro. Eliz. 525; *Woodward v. Glasbrook*, 2 Vern. 388; and Lord St. Leonard's judgment in *Grey v. Pearson*, 6 H. L. 61. The devise over in this case takes effect as a remainder after an estate tail.

Devise to A. in tail, and if he dies under 21 or without issue over.

6. But if the devise over after an estate tail to A. is in case of the death of A., or want of his issue, "or" must be read "and," in order to preserve the prior estate. *Monkhouse v. Monkhouse*, 3 Sim. 119.

Gift over in case of death of the devisee or failure of his issue.

7. "Or" will be read "and" when a gift is given upon either of two events, as upon attaining twenty-one or marriage, and there is gift over upon death under twenty-one or unmarried, the gift over being otherwise inconsistent with the prior gift. *Grant v. Dyer*, 2 Dow. 87; *Thompson v. Teulon*, 22 L. J. Ch. 243; *Thackeray v. Hampson*, 2 S. & St. 214; *Grimshawe v. Pickup*, 9 Sim. 591; *Collett v. Collett*, 35 B. 312.

"Or" read "and" in the gift over when the gift is vested in one or other of the two events.

8. In some cases where there has been a gift contingent upon attaining twenty-one, subject to a life interest, and a gift over upon death before the tenant for life or under twenty-one, "or" has been read "and." *Miles v. Dyer*, 5 Sim. 435; 8 Sim. 330; *Bentley v. Meech*, 25 B. 197.

Gift over upon death before the tenant for life, or under 21.

And if a gift over upon death under age or without leaving a husband is afterwards referred to as "in case of death under age as aforesaid," "or" will be read "and." *Weddell v. Mundy*, 6 Ves. 341.

## GIFT OVER UPON DEATH WITHOUT CHILDREN.

"Children" read  
"issue" in a gift  
over upon  
death  
without  
children.

In many cases where an estate in fee is given, followed by a gift over in the event of the devisee dying without children, the word children has been construed as synonymous with issue. *Doe v. Webber*, 1 B. & Ald. 713; *Doe d. Simpson v. Simpson*, 5 Sc. 770; 4 Bing. N. C. 333; *Doe d. Blesard v. Simpson*, 3 M. & Gr. 929; *Bacon v. Cosby*, 4 De G. & S. 261; *Parker v. Birks*, 1 K. & J. 156; *Richards v. Davies*, 13 C. B. N. S. 69, 861; see *Mathews v. Gardiner*, 17 B. 254.

And the same construction would perhaps be put upon a similar gift over after an absolute bequest of personalty. *Synge's Trust*, 3 Ir. Ch. 379; see *Stone v. Maule*, 2 Sim. 490.

GIFTS OVER UPON DEATH WITHOUT LEAVING OR  
HAVING ISSUE.

Leaving  
construed  
as equivalent  
to  
having.

The word leaving in a gift over upon death without leaving issue will, if possible, be so construed as not to destroy prior vested interests, it will in fact be taken as equivalent to "without having had children who take vested interests."

1. Thus, when there is a bequest or devise to A. for life and after his death to his children, whether a particular time is fixed at which their shares are to vest or not, followed by a gift over upon the death of A. without leaving children, the children of A., either at their birth or at the particular time appointed, as the case may be, take indefeasible interests not liable to be defeated by death during the life of A. *Maitland v. Chalie*, 6 Mad. 243; *Marshall v. Hill*, 2 Mau. & S. 608; *Ex parte Hooper*, 1 Dr. 264; *Kennedy v. Sidgwick*, 3 K. & J. 540; *Re Thompson's Trusts*, 5 De G. & S. 667; *White v. Hill*, 4 Eq. 265;

*Casamayor v. Strode*, 8 Jur. 14; *In re Brown's Trust*, 16 Eq. 239; *Treharne v. Layton*, L. R. 10 Q. B. 459.

2. The same construction has been followed where there was a devise to A. absolutely and after her death without leaving issue over. *White v. Hight*, 12 Ch. D. 751.

3. The Court, however, will not depart from the ordinary meaning of the word leaving, in order to vest interests which were not vested before.

When the gift is, for instance, if the tenant for life leaves children, to all such children, with a gift over in the event of his death without leaving children, the word leaving must have its ordinary meaning. In these cases the condition of surviving the tenant for life is part of the original gift, and there is no question of divesting a prior gift. *Sheffield v. Kennett*, 27 B. 207; 4 De G. & J. 593; *Bythessea v. Bythessea*, 17 Jur. 645; 23 L. J. Ch. 1004; *Young v. Turner*, 1 B. & S. 550; see *In re Watson's Trust*, 10 Eq. 36, and the comments therein upon *Bryden v. Willett*, 7 Eq. 472; *Jeyes v. Savage*, 10 Ch. 555; and see *Hedges v. Harper*, 3 De G. & J. 129.

4. It seems the words "without having any child" may be construed as equivalent to "without having had" any child. *Weakley d. Knight v. Rugg*, 7 T. R. 322; *Wall v. Tomlinson*, 16 Ves. 413; *Jeffreys v. Conner*, 28 B. 328.

5. But the words "without any children" mean without children at the death. *Thicknesse v. Liege*, 3 B. P. C. 365; *Jeffreys v. Conner*, *supra*.

## CHAPTER XL.

## GIFTS OVER UPON DEATH WITHOUT ISSUE.

Gift over upon death of the devisee without issue before a given period.

WHEN there is a gift over upon the death of A. without issue before a given period, the gift over takes effect upon the failure of issue of A., not necessarily at his death, but at any time before the given period, whether the will is before or since the Wills Act. *Jarman v. Vye*, L. R. 2 Eq. 784.

Gift over upon death without issue to persons then living.

It is not quite clear whether a devise upon failure of issue to such of certain named legatees as should be "then living," which would in a will before the Act have been held to take effect upon failure of issue of the ancestor at his death, or at any time during the lives of the surviving legatees, would now be held to take effect only upon failure of issue of the ancestor at his death. See *Murray v. Addenbrook*, 4 Russ. 407; *Greenwood v. Verdon*, 1 K. & J. 74.

Effect of the 29th sec. of the Wills Act upon gifts in default of issue.

By the 29th section of the Wills Act, 1 Vict. c. 26, words "which may import either a want or failure of issue of any person in his lifetime, or at the time of his death, or an indefinite failure of his issue, shall be construed to mean a want or failure of issue in the lifetime, or at the time of the death of such person, and not an indefinite failure of his issue, unless a contrary intention shall appear by the will, by reason of such person having a prior estate tail or of a preceding gift being, without any implication arising from such words, a limitation of an estate tail to

such person or issue, or otherwise: provided that this Act shall not extend to cases where such words as aforesaid import if no issue described in a preceding gift shall be born, or if there shall be no issue who shall live to attain the age or otherwise answer the description required for obtaining a vested estate by a preceding gift to such issue."

See *In re Chinnery's Estate*, 1 L. R. Ir. 296.

The words dying without male issue will, under this section, be restricted to male issue living at the death of the ancestor. *Upton v. Hardman*, 1 R. 9 Eq. 157.

This section does not apply:—

1. Where the words used are heirs of the body and not issue. *Harris v. Davis*, 1 Coll. 416; *Re Sallery*, 11 Ir. Ch. 236; *Dawson v. Small*, 9 Ch. 651.

In what cases the section does not apply.

2. Where the failure of issue would not before the Act have been construed to import an indefinite failure of issue. *Morris v. Morris*, 17 B. 198.

3. Apparently it would not apply where there is a gift of personalty to A. and the heirs of his body, followed by a gift over in default of his issue. At any rate, it does not where realty and personalty are given together in tail. *Green v. Green*, 3 De G. & Sm. 480; see *Greenway v. Greenway*, 2 D. F. & J. 137; *Green v. Giles*, 5 Ir. Ch. 25.

## REFERENTIAL CONSTRUCTION OF GIFTS OVER UPON DEATH WITHOUT ISSUE.

The construction of gifts over in default of issue is not affected by the Wills Act where those words are construed to mean default of issue to take under the preceding limitations. It becomes necessary, therefore, to consider in what cases the referential construction has been adopted.

A. Where the words are for default of *such* issue, they naturally refer to the issue before mentioned.

Gift over in default of such issue, after limitations in tail. 1. This is clearly the case where the prior limitations are in tail. *Doe d. Phipps v. Lord Mulgrave*, 5 T. R. 320.

2. So where the prior limitations are to children and their heirs, a gift over in default of such issue means in default of such children. *Doe d. Comberbach v. Perryn*, 3 T. R. 484; *Rex v. Marquess of Stafford*, 7 East, 521.

But if there is anything to show that the children were intended to take estates tail, the words in default of such issue may be referred to the word heirs so as to cut down the estates to estates tail. Thus, where the limitation was to the first and other sons and their heirs, a gift over in default of such issue was referred to the word heirs, the intention being that the sons were to take in succession. *Lewis d. Ormond v. Waters*, 6 East, 336.

In *Biddulph v. Lees*, 8 E. & B. 289, the intention to give estates tail was apparent from the shifting clause.

After limitations for life. 3. And even though the limitation be to children simply, so that they would only take for life, a gift over in default of such issue will be construed referentially. *Hay v. Earl of Coventry*, 3 T. R. 83; *Denn d. Breddon v. Page*, 3 T. R. 87, *n.*; 11 East, 603, *n.*; *Ashley v. Ashley*, 6 Sim. 358; *Bridger v. Ramsay*, 10 Ha. 320; *Re Arnold's Estate*, 33 B. 163.

After limitations giving a first son a life interest only, and the other sons estates tail. 4. On the other hand, where there is a limitation to a first son without more, followed by limitations in default of such issue to the other sons in tail, the Court will lay hold of small circumstances to give the first son also an estate tail.

Thus, in *Evans d. Brooke v. Astley*, 3 Burr. 1569, there was the circumstance that the testator referred to the earlier limitations as including the "parent and his descendants."



In *Clements v. Paske*, 3 Doug. 384, the limitation to the first son was referred by the word "likewise" to other limitations in fee.

And see *Doe d. Harris v. Taylor*, 10 Q. B. 718, which may perhaps be supported on the ground that the words "the elder of such sons and the heirs of his body to take before the younger," applied to the first son as well as to the others. See, however, *Barnacle v. Nightingale*, 14 Sim. 456; and see *Galley v. Barrington*, 2 Bing. 387; *In re Denny's Estate*, I. R. 8 Eq. 427.

5. The *prima facie* meaning of the word "such" is to refer the word with which it is coupled to earlier words, so that the latter word is only a compendious statement of the earlier limitations; it may, however, have the converse effect, if there is anything upon the will to show that the testator used the earlier word in the sense of the later; and the word "such" may be rejected, if the term with which it is coupled and that to which it refers are so inconsistent with each other, that the testator cannot have meant the one as a mere compendious reference to the other.

Thus, a devise to A. and his heirs, and in default of such issue over would, perhaps, in a will cut down A.'s estate to an estate tail. See *Idle v. Cook*, 1 P. Wms. 70.

And in *Parker v. Tootal*, 11 H. L. 143, where the devise was to Thomas for life, remainder to the first son of the said Thomas in tail male lawfully begotten, severally and successively; and for want of such lawful issue either of Thomas or of James, over, the word such was practically rejected and Thomas took an estate tail.

B. When there is a devise to A. for life, followed by particular limitations in favour of some of his issue, with an ultimate limitation on failure of the issue of A., the question arises whether the intention was to benefit all the issue, notwithstanding the incomplete enumeration of

Inaccurate  
use of the  
word  
"such."

Gift over  
in default  
of issue  
simply.

them under the special limitation, in which case, in wills before the Wills Act, the gift over in default of issue will give A. an estate tail, or whether the issue intended to be benefited are sufficiently indicated by the special limitations, in which case the failure of issue will be construed to mean such issue as before mentioned.

When the prior limitations are to the ancestor for life with remainder to his children in fee or in tail.

1. If the devise is to A. for life, then to his children, so that they take vested estates in fee or tail, and in default of issue of A. over, issue means the issue before mentioned, and A.'s estate will not be enlarged. *Foster v. Hayes*, 2 E. & B. 27; 4 E. & B. 717; *Towns v. Wentworth*, 11 Moo. P. C. 526; *Smyth v. Power*, 1 R. 10 Eq. 192.

When the prior limitations include sons only.

And this is the case, though the children included under the prior limitations may be sons only and not daughters, and though the prior estates may be in tail male. *Turke v. Frenchman*, 2 Dyer, 171; 1 And. 8; *Baker v. Tucker*, 11 Ir. Eq. 104; 3 H. L. 106.

*Quare*, whether it makes any difference in the construction of the gift over in default of issue that the ancestor has children living at the date of the devise. See *Doe d. Todd v. Tuesbury*, 8 M. & W. 514, commented on in 4 E. & B. 730.

Where the prior limitations include less than the whole number of sons.

2. If, however, the prior limitations include less than the whole number of sons the referential construction will not be adopted. *Langley v. Baldwin*, 1 Eq. Ab. 185, pl. 29, cit. 1 P. W. 759; *A.-G. v. Sutton*, 1 P. W. 753; 3 B. P. C. 75; *Stanley v. Lennard*, Amb. 355; 1 Ed. 87; *Key v. Key*, 4 D. M. & G. 73.

The referential construction is, however, more readily adopted where the limitations are to some of the issue at twenty-one, and there is a gift over in default of issue who attain twenty-one. *Sanders v. Ashford*, 28 B. 609.

When the failure of issue is

3. If the failure of issue is restricted to failure at the death of the parent the referential construction will not

be adopted, as it might have the effect of divesting the interests of children who had died before the tenant for life leaving children. *Westwood v. Southey*, 2 Sim. N. S. 192; *Ex parte Hooper*, 1 Dr. 264; *Re Tookey's Trust*, 21 L. J. Ch. 402; *In re Biron*, 1 L. R. Ir. 258.

restricted to such failure at the ancestor's death.

4. If the gift is to A. for life, then to such issue as he should appoint by will and if A. dies without issue over, issue in the gift over is held to refer to the issue before-mentioned, that is to say, issue living at the death of A. *Target v. Gaunt*, 1 P. W. 432; *Hockley v. Mawbey*, 1 Ves. jun. 143; 3 B. C. C. 82; *Leeming v. Sherratt*, 2 Ha. 14; *Hanan v. Drew*, 10 Ir. Eq. 333; *Eastwood v. Avison*, L. R. 4 Ex. 141.

Gift over in default of issue after a power to appoint to issue by will.

5. When the limitations to issue are contingent upon attaining a certain age, it seems the referential construction would not be adopted. *Doe d. Rew v. Lucraft*, 1 M. & Sc. 573; 8 Bing. 386; *Franks v. Price*, 6 Sc. 710; 5 Bing. N. C. 37; 3 B. 182.

Where the limitations to issue are contingent.

6. In wills before the Wills Act, where the devise to children is without words of limitation so that they only take estates for life, the referential construction will not be adopted, but the parent will take an estate tail in remainder after the life estates. *Parr v. Swindells*, 4 Russ. 283. *Bennett v. Lowe*, 5 M. & Pay. 485; 7 Bing. 535, is not inconsistent with this rule, since the gift over was not upon an indefinite failure of issue; and *Wight v. Leigh*, 15 Ves. 564, which conflicts with the latter branch of this rule, would probably not now be followed.

Where the children take for life only in wills before the Wills Act.

C. Similar rules apply to personalty.

1. Thus, in a bequest to A. for life and then to his children and if A. dies without issue over, the gift over refers to the failure of the objects of the prior gift. *Doe d. Lyde v. Lyde*, 1 T. R. 593; *Salkeld v. Vernon*, 1 Ed. 64; *Robinson v. Hunt*, 4 B. 450; *In*

Referential construction of gifts over upon death without issue in the case of personalty.

*re Wyndham's Trusts*, L. R. 1 Eq. 290; *In re Sanders' Trusts*, *ib.* 675.

"If there be no child there can be no other issue, and if there be a child, the child will take the whole, and there will be nothing to limit over." *Per* Turner, L. J., *Pride v. Fooks*, 3 De G. & J. 252.

Where family plate was settled on A. for life, with remainder to B. his first son for life, with remainder to B.'s first son absolutely and in the event of B.'s first son dying under twenty-one and without issue to the second and other sons of B. in the same way and in default of sons of B. similar limitations in favour of the second and other sons of A. absolutely, with an ultimate limitation if there should be no son of A. or B. who should attain twenty-one or die under that age leaving issue, the ultimate gift over took effect, though B. attained twenty-one. *Cardigan v. Curzon Howe*, 9 Eq. 358.

Where the  
prior gifts  
to issue are  
contin-  
gent.

2. Where the prior gifts to the children are not vested so that there may be issue who may not take under them, for instance, children of children who die before the time of vesting, it is less easy to admit the referential construction and it seems that without some further indications to be collected from the will it will not be adopted. *Pride v. Fooks*, 3 De G. & J. 252; *Walker v. Mower*, 16 B. 365.

And the same is the case where the gifts to the children are only to arise upon a contingency, as for instance, if the legatee marries. *Andree v. Ward*, 1 Russ. 260; *Campbell v. Harding*, 2 R. & M. 390; 2 Cl. & Fin. 431; 8 Bl. N. S. 469.

Under a gift to a tenant for life and then to such children as she should leave at her decease, with a power of appointment to the tenant for life in the event of her death without issue, the referential construction was adopted. *In re Mercer's Trusts*; *Davies v. Mercer*, 4 Ch. D. 182.

3. The referential construction may be assisted by other limitations. See *Malcolm v. Taylor*, 2 R. & M. 416, where this construction was assisted by the devise of the realty. Referential construction assisted by other limitations.

4. And when there is elaborate provision made for the issue of children dying before the time of vesting and born within the limits of perpetuity, a gift over in default of issue may very well be referred to the prior limitations. *Ellicombe v. Gompertz*, 3 M. & Cr. 127; *Trickey v. Trickey*, 3 M. & K. 560. When the issue of parents dying before the time of vesting are provided for.

5. The referential construction will not be adopted where the bequest is in joint tenancy to A. and her children, with a gift over in default of issue. In this case the whole is already disposed of, whether children are born or not, and in the absence of some further indication of intention there can be no reason for attempting to make the gift over valid in order to divest absolute interests. *Fisher v. Webster*, 14 Eq. 283. Bequest in joint tenancy to a parent and children, followed by a gift over on death without issue.

#### GIFTS OVER UPON DEATH WITHOUT ISSUE BEFORE THE WILLS ACT.

Such words as "dying without issue," or "without leaving," or "having issue" in devises before the Wills Act, are construed to mean an indefinite failure of issue. *Lee's Case*, 1 Leon. 285, pl. 387; *Cole v. Goble*, 13 C. B. 445.

But with regard to personalty, death without *leaving* issue is held to mean leaving issue at the death. And where real and personal estate is devised by the same words, death without leaving issue will import an indefinite failure of issue as regards the realty, but a failure of issue at the death as regards the personalty. *Forth v. Chapman*, 1 P. W. 663; *Bamford v. Chadwick*, 2 W. R. 530. Cases before the Wills Act, in which gifts over on failure of issue will not impart an indefinite failure.

The failure of issue will, however, be restricted in devises of realty :

Gift over  
upon fail-  
ure of the  
testator's  
own issue.

1. If the ulterior limitations are made to depend upon a failure of issue of the testator and there are found amongst the ulterior limitations provisions which could not reasonably be meant to depend upon a general failure of issue, such as directions for payment of debts. *Rye's Settlement*, 10 Ha. 106.

It has been said that a devise on failure of the testator's own issue, he having none at the time, will in itself be sufficient to show that the testator does not refer to an extinction of issue at any time. The cases, however, quoted in support of the proposition cannot be said to establish the exact point, since in all of them the devise over was for payment of debts or legacies. *French v. Cuddell*, 3 B. P. C. 257; *Wellington v. Wellington*, 4 Burr. 2165; 1 W. Bl. 645; *Lytton v. Lytton*, 4 B. C. C. 441; *Sanford v. Irby*, 3 B. & Ald. 654.

In *Bagot v. Legge*, 12 W. R. 1097; 4 N. R. 492, it was assumed that a devise upon failure of the testator's issue, though he had none at the time, would have been void for remoteness.

Death  
without  
issue under  
21.

2. If the devise is upon death without issue under twenty-one or over twenty-one, or upon some other event personal to the devisee. *Toovey v. Cussett*, 10 East, 460; *Right v. Day*, 16 East, 67; *Gwyne v. Berry*, 1 R. 9 C. L. 494.

The same rule has been applied where the limitations were upon death under twenty-one and without issue. *Glover v. Monckton*, 3 Bing. 13; *Doe d. Johnson v. Johnson*, 8 Ex. 81.

But the rule does not apply where the event is not purely personal to the devisee; for instance, if the gift over is if A. survives B. and dies without issue. *Feakes v. Standley*, 24 B. 485.

3. So, too, with regard to personalty, a gift over if A. dies under twenty-one without issue means issue living at his death. *Pawlet v. Dogget*, 2 Vern. 85; *Martin v. Long*, ib. 151; *Morris v. Morris*, 17 B. 198. As regards personalty.

4. Failure of issue is restricted to failure at the death of the parent if the devise is on failure of the issue of A, then "at" or "on" the death of A. over. *Doe d. Smith v. Webber*, 1 B. & Ald. 713; *Doe d. King v. Frost*, 3 B. & Ald. 546; *Ex parte Davies*, 2 Sim. N. S. 114; *Parker v. Birks*, 1 K. & J. 156. Gift over at or on the death of the ancestor.

It makes no difference whether A. takes the fee or only a life estate owing to the absence of words of limitation. *Coltsmann v. Coltsmann*, L. R. 3 H. L. 121.

There seems no reason to doubt that in the case of realty the words "after the death of A." would *prima facie* mean immediately after and have the same restrictive force as they have in the case of personalty. See *Trotter v. Oswald*, 1 Cox, 317. Effect of the word after.

But it may appear from the context that those words were not to have a restrictive force. *Walter v. Drew*, Com. 373; *Jones v. Ryan*, 9 Ir. Eq. 249.

In the same way with regard to personalty, if the gift is if A. die without issue at, on, or after his decease over, the failure of issue means failure at A.'s death. *Pinbury v. Elkin*, 1 P. Wms. 563; *Trotter v. Oswald*, 1 Cox, 317; *Wilkinson v. South*, 7 T. R. 555; *Rackstraw v. Vile*, 1 S. & St. 604; *Hedges v. Harper*, 3 De G. & J. 129. Rule in the case of personalty.

5. So, too, if a sum of money is to be paid upon the decease of the devisee, upon failure of whose issue the estate is given over, or within a short time afterwards, the failure of issue will not import an indefinite failure. *Doe d. Smith v. Webber*, 1 B. & Ald. 713; *Doe d. King v. Frost*, 3 B. & Ald. 546; *Nichols v. Hooper*, 1 P. W. 198; 2 Vern. 686; *Blinston v. Warburton*, Effect of a direction to pay a sum of money upon the decease of the ancestor.

2 K. & J. 400; *Rye's Settlement*, 10 Ha. 106. Perhaps *Keily v. Fowler*, 6 B. P. C. 309; Wilm. 298, comes under this head.

Gift over  
in default  
of issue to  
persons  
"then  
living."

6. A gift over upon failure of issue to persons "then living," the persons being such as must be ascertained within the limits of perpetuity, will not be construed to mean an indefinite failure of issue. *Murray v. Addenbrook*, 4 Russ. 407; *Greenwood v. Verdon*, 1 K. & J. 74.

In such cases the failure of issue contemplated is not a failure at the death of the ancestor, but at any time during the lives of the legatees to take under the gift over. Cases *supra* cit., and *Crowder v. Stone*, 3 Russ. 217; and see *Jarman v. Vye*, L. R. 2 Eq. 784.

*Candy v. Campbell.*

In *Candy v. Campbell*, 8 Bl. N. S. 469; 2 Cl. & F. 421, a gift in default of issue to the testator's nephews and nieces who might be living at the time, was held void for remoteness. In this case the nephews and nieces may not all have been born at the testator's death, the donees therefore would not have been ascertained within the limits of perpetuity.

In *Gee v. Audley*, 1 Cox, 324, the point does not appear to have been raised whether the failure of issue could be restricted to the lives of the persons to take under the gift over.

Of course, where the class to whom the property is given on failure of issue would include persons coming into being at any time before the failure of issue takes place, there is no reason for restricting the failure of issue. *Webster v. Parr*, 26 B. 236.

Gift in  
default of  
issue to a  
class ascer-  
tainable  
upon some  
collateral  
event.

In the same way, where the class, to whom the gift is made upon failure of issue, is not to be ascertained at the time when the failure happens, but upon some collateral event; if, for instance, the gift is upon failure of issue to the children of my brothers living at the death of my last



child, so that the class to take is ascertained at a different time from the period of possession, there is no reason for restraining the failure of issue, since children may take transmissible interests without surviving the failure of issue. *Garrett v. Cockerell*, 1 Y. & C. C. 494.

7. It would seem that the same principle ought to apply where the gift is to several, and if any die without issue to the survivors. Gift in default of issue to survivors.

Therefore, in such a case, if survivors means those who survive the failure of issue, the failure of issue can only import a restricted failure. The cases, however, seem to show that a mere gift if any die without issue to the survivors without more would be sufficient to restrict the failure of issue to the death of the parent. *Hughes v. Sayer*, 1 P. Wms. 534; *Ranelagh v. Ranelagh*, 2 M. & K. 441; *Westwood v. Southey*, 2 Sim. N. S. 192; *Turner v. Frampton*, 2 Coll. 331. When survivorship refers to the failure of issue.

But if survivor means not the person surviving the failure of issue but the longest liver of the legatees, so that one legatee surviving another would take a transmissible interest before the failure of issue, the failure of issue will not be restricted. *Chadock v. Cowley*, Cro. Jac. 695. When survivorship is merely among the legatees.

It is submitted that, where the meaning of survivors is clear, words of limitation superadded are immaterial; but where it is doubtful whether the survivorship contemplated is between the legatees or is to be referred to the period of failure of issue, words of limitation superadded afford a strong argument that the former was intended. *Massey v. Hudson*, 2 Mer. 130; *O'Donohoe v. King*, 8 Ir. Eq. 185. Effect of words of limitation.

Upon the same principle, in all those cases where survivors would be read others, or there is an intention to benefit not merely the persons who survive the failure of issue, but their stirpes, the failure of issue will not be When survivorship is referrible to the stirpes.

restricted. *Roe v. Scott*, Fearn, C. R. 473, n; *Taylor v. Walker*, 13 W. R. 986; *Assignees of Leadbeater*, I. R. 8 Eq. 422; see, too, *M'Clenaghan v. Bankhead*, I. R. 8 C. L. 195.

Gift over  
in default  
of issue to  
a named  
person.

8. There is no authority for saying that a gift on failure of issue to A., a definite named person without more, would have the effect of restricting the failure of issue. *Lord Beauclerk v. Dormer*, 2 Atk. 307; *Barlow v. Salter*, 17 Ves. 479; see Fearn, C. R. 481.

Intention  
to confer  
personal  
enjoy-  
ment.

On the other hand, a gift in default of issue of A. to two persons, or such of them as should be then living, has been held sufficient to show that the testator meant a personal enjoyment by the legatees and could not therefore have intended a general failure of issue. *Wilson v. Chesnut*, I. R. 1 Eq. 559. Perhaps *Roe d. Sheers v. Jeffery*, 7 T. R. 589, may stand on this ground.

*Jones v. Cullimore*, 3 Jur. N. S. 404, where the gift was on failure of issue to such of my children as may be then living, and if none should be then alive to a person named, and a class must probably be supported on the ground that the testator showed by the gift to children then living that he did not intend an indefinite failure of issue, and not on the ground that the ultimate gift was to a definite person.

Where the  
subsequent  
estates are  
all for life.

9. Perhaps failure of issue would be restricted if the subsequent estates are all given to living persons for life only. *Roe d. Sheers v. Jeffery*, 7 T. R. 589; see *Trafford v. Buchm*, 3 Atk. 440.

Where the  
estate is  
*pur autre*  
*vie*.

10. If the estate devised is *pur autre vie* a limitation over in default of issue is good, since it cannot be held to mean a failure, which might take place after the determination of the estate. *Croly v. Croly*, Batty, 1; *Manning v. Moore*, Alc. & Nap. 96; *Lee v. Flinn*, Ib. 418.

Devise on  
a general  
failure of

11. If the property devised is a reversion which comes into possession only after the failure of issue of some

person, a devise of such reversion after failure of the issue in question is in effect an immediate devise of the reversion and therefore valid. And even if the event upon which the reversion is expressed to be devised is larger than and includes the event upon which it comes into possession, the devise will be good if in effect the two events are the same, and the intention is merely to devise the reversion. If, for instance, the reversion falls into possession on failure of issue by a particular wife of the testator and the testator devises it upon a general failure of issue, the devise is good, as the birth of issue by a second marriage would revoke the will. *Jones v. Morgan*, Fearne, C. R. App. 577; 3 B. P. C. 322; *Lytton v. Lytton*, 4 Bro. C. C. 441.

issue of a  
reversion  
dependent  
on failure  
of certain  
lines of  
issue.

In the same way, if the testator erroneously recites that he is entitled to the reversion of certain estates on the death of a son without issue generally, and then devises the reversion on failure of such issue, the devise is good, the intention being clear to devise the reversion. *Lewis v. Templar*, 33 B. 625; see *Bankes v. Holme*, 1 Russ. 394, *n*.

But a mere devise of a reversion upon a failure of a larger class of issue than that upon which it is limited, will not operate as an immediate devise of the reversion. *Lady Lanesborough v. Fox*, Cas. temp. Talb. 262.

## CHAPTER XLI.

## SHIFTING CLAUSES.

WHERE estates are given by will, and there is a clause shifting the lands if the devisee comes into possession of estates previously settled, the estates go over if the event happens. *Cope v. Earl de la Warr*, 8 Ch. 982.

A shifting clause operates upon a life estate, though the life estate comes into possession in the same event as that upon which the shifting clause is to take effect. Possession of settled estates *primd facie* refers to possession under the settlement.

And the shifting clause will operate upon the life interest of a tenant for life, though his interest is such, that if he comes into possession of the settled estates, his life interest under the will must at the same time come into possession; so that, in effect, the gift of the life interest is nugatory. *Lambarde v. Peach*, 4 Dr. 553; 1 D. F. & J. 495.

When estates devised by will are directed to shift on the devisee coming into possession of settled estates, the presumption is that the testator means a possession under the settlement; and, therefore, if the devisee comes into possession of the settled estates not under the settlement, but under an entirely new title, for instance, under the will of a tenant in tail, who had barred the entail, the shifting clause will not take effect. *Taylor v. Earl of Harewood*, 3 Ha. 372; *Wandesforde v. Carrick*, 1 R. 5 Eq. 486.

*A fortiori*, where the shifting clause is to take effect on the devisee becoming entitled to other estates under any existing or future will or settlement and he becomes

entitled by descent from his father, though the latter took under a will, the devised estates will not shift. *Walmesley v. Gerard*, 29 B. 321.

The term entitled would in such a clause mean entitled in possession. *Umbers v. Jaggard*, 9 Eq. 200; see *Gryll's Trusts*, 6 Eq. 589; *In re Finch*; *Abbyss v. Burney*, 28 W. R. 903.

If the devisee takes the settled estates not under the settlement existing at the date of the will, but under a resettlement, which can be looked upon as a continuation of the old title, the devisee taking the same interest under the resettlement as he would have taken under the old settlement, except so far as his interest has been diminished for his own benefit, the shifting clause takes effect. *Harrison v. Round*, 2 D. M. & G. 190; see *In re Croker's Estate*, I. R. 2 Eq. 58.

If the devisee takes under the resettlement a diminished interest in the settled estates or the estates themselves are diminished in quantity, the shifting clause has no effect. *Fazakerley v. Ford*, 4 Sim. 390; see 3 A. & E. 897; *Gurdiner v. Jellicoe*, 12 C. B. N. S. 568; *Meyrick v. Laws*, 9 Ch. 237.

On the other hand, if the testator expressly gives directions to have a portion of the settled estates settled to other uses, the devolution of the settled estates to the devisee diminished by that portion will not prevent the operation of the shifting clause. *Micklethwait v. Micklethwait*, 4 C. B. N. S. 790; and see *Stacpoole v. Stacpoole*, 2 Con. & Law. 489, 501.

The shifting clause will not, in the absence of a clear intention, take effect where the devisee has only an interest in remainder in the settled estates. *Monypenny v. Dering*, 2 D. M. & G. 145; *Curzon v. Curzon*, 1 Giff. 248; *Bagott v. Legge*, 34 L. J. Ch. 156; 12 W. R. 1097.

As to the repeated operation of a shifting clause, see

Meaning of  
"entitled."

Whether  
a devisee  
taking  
settled  
estates  
under a re-  
settlement  
is within a  
shifting  
clause.

*Doe d. Lumley v. Earl of Scarborough*, 3 A. & E. 2, 897; *Monypenny v. Dering*, 2 D. M. & G. 145.

It seems a shifting clause would not avoid jointures and portions properly charged upon the estates previous to their shifting. *Holmesdale v. West*, 12 Eq. 280.

In what cases estates directed to shift to the next remainder-man will go to the trustees to preserve.

Where an estate devised by will is directed upon the devolution of settled estates to the devisee to go over to the next remainder-man, as if the tenant for life were dead, the estate will shift to trustees, to preserve contingent remainders where there are contingent remainders to unborn sons of the tenant for life whose life estate has ceased; though, strictly speaking, if the tenant for life were dead, the estate of the trustees to preserve would also be at an end. *Doe v. Heneage*, 4 T. R. 13; see the opinion of Fearn, C. R. App. No. 6; *Stanley v. Stanley*, 16 Ves. 491; *Morrice v. Langham*, 11 Sim. 260; 12 Sim. 615; and see 11 Cl. & F. 667; *Lambarde v. Turton*, 4 Dr. 553; 1 D. F. & J. 495; see *Lord Kenlis v. Earl of Bective*, 34 B. 587.

Who is entitled to the intermediate rents.

As to whether the heir or remainder-man is entitled to the rents during the period between the shifting of the estate to the trustees and the birth of issue to take, it seems that a direction that the rents may be applied for the maintenance of a remainder-man even during the lifetime of a tenant for life, would be sufficient to show that the rents were not to go to the heir. *Turton v. Lambarde*, 1 D. F. & J. 495, judgment of the L. J. Turner. *D'Eyncourt v. Gregory*, 34 B. 36.

On the other hand, in the absence of some such intention, they would go to the heir. *Stanley v. Stanley*, 16 Ves. 491; and see per Kindersley, V.-C., *Lambarde v. Peach*, 4 Dr. 553.

Estate directed to shift as if the devisee

When the devised estate is directed to go over, as if the person becoming entitled to the settled estates were dead without issue, the next remainder-man takes

on the event happening. *Morrice v. Langham*, 8 M. & W. 194. were dead without issue.

And in such a case, if the next limitations in remainder are contingent, the estates will not go to trustees to preserve contingent remainders during the life of the person from whom the estate is shifted, since their estate would in any event be inadequate to support contingent remainders limited upon a failure of issue of such person after his death. *Carr v. Earl of Errol*, 6 East, 58. In such case trustees to preserve will not take.

When the devised estates are directed to go to the next remainder-man, as if the person taking the benefit upon the accruer of which the estate is to shift were dead without issue, the construction will not be influenced by the fact that the younger children of the person from whom the estates shift may happen to take no benefit under the settlement. *Doe v. Earl of Scarborough*, 3 Ad. & E. 1.

But where estates were devised to several sons successively in tail male, with remainder to the children of the sons in tail general, with remainder over, and the estates were directed to go over upon the acquisition of settled estates (which could not go to any female issue of the testator's sons), as if the person taking the settled estates were dead without issue, the words "without issue" were confined to issue capable of taking under the limitations of the devised estate preceding the next remainder. *Gardiner v. Jellicoe*, 12 C. B. N. S. 568; 11 H. L. 323. Issue limited to issue capable of taking under the limitation of the devised estate preceding the next remainder.

## CHAPTER XLII.

## GIFTS BY REFERENCE.

**Bequest of chattels to go according to the limitations of real estate, vests in the first tenant in tail on birth.** A BEQUEST of chattels to go according to the same limitations as real estate or as heirlooms, vests absolutely in the first tenant in tail on birth, whether the words "so far as the rules of law and equity permit" are inserted or not. The Court, in fact, refuses to treat such a bequest as executory. *Vaughan v. Burslem*, 3 B. C. C. 101; *Rowland v. Morgan*, 6 Ha. 463; 2 Ph. 764; *Carr v. Lord Erroll*, 14 Ves. 478; *Burrell v. Crutchley*, 15 Ves. 544; *Lord Scarsdale v. Curzon*, 1 J. & H. 40; *In re Johnson's Trusts*, L. R. 2 Eq. 716.

The same rule applies to policies of insurance upon the lives on which leaseholds bequeathed for life with remainders in tail are held. *Miller v. Stanley*, 12 W. R. 780.

Where the chattels were bequeathed to A. for life and then to the person in actual possession of the freeholds under the will, it was held that the person who would have been tenant in tail at the death of A. was entitled to them, though the estate tail had been barred by a prior tenant in tail. *Hogg v. Jones*, 32 B. 45.

But the chattels will not vest in a tenant in tail whose estate is liable to be divested by the birth of issue to take under prior limitations and who dies before his estate becomes indefeasibly vested. *Hogg v. Jones*, 32 B. 45.

**Bequest of chattels to the person** Similarly, chattels directed to go to the persons entitled in possession to estates will go to a tenant for life, unless



they are directed to go as heirlooms or there is an intention expressed that the personalty is to go along with the realty. *Trafford v. Trafford*, 3 Atk. 347; *In re Johnson's Trusts*, L. R. 2 Eq. 716. entitled in possession to real estate.

If there is such an intention, a tenant for life of the realty, or, where the personalty is to go with a title, the first possessor of the title, will take only an estate for life in the personalty. *Trafford v. Trafford*, 3 Atk. 347; *Shelley v. Shelley*, 6 Eq. 540; *Montagu v. Lord Inchiquin*, 23 W. R. 592; see *Mackworth v. Hinxman*, 2 Kee. 658.

Chattels given as heirlooms and directed to go to such person as shall first attain twenty-one and be entitled to an estate tail in possession in the settled estate, will nevertheless vest absolutely in a tenant in tail in remainder who attains twenty-one. *Foley v. Burnell*, 1 B. C. C. 274; 4 B. P. C. 319; *In re Johnson's Trusts*, L. R. 2 Eq. 716; *Martelli v. Holloway*, L. R. 5 H. L. 532.

But a plain intention that no person shall take the chattels who does not live to become entitled to the possession of the realty, will have effect. *Trafford v. Trafford*, 3 Atk. 347; see *per* Lord Eldon in *Countess of Lincoln v. Duke of Newcastle*, 12 Ves. 231; *Potts v. Potts*, 3 J. & Lut. 353; 9 Ir. E. 577; 1 H. L. 671; *Cox v. Sutton*, 25 L. J. Ch. 845; 2 Jur. N. S. 733; *Lord Scarsdale v. Curzon*, 1 J. & H. 52. Intention that no person not in actual possession is to take.

When heirlooms are directed to go with real estates as far as the rules of law and equity permit, with a proviso that they are not to vest absolutely in any tenant in tail dying under twenty-one, it seems doubtful whether, in the event of a tenant in tail dying under twenty-one, the effect of the words "as far as the rules of law and equity permit" will be to carry on the property to the next succeeding tenant in tail, or whether the result would be an under Whether the words "as far as the rules of law admit" will carry on chattels directed not to vest in a tenant in tail dying under

twenty-one to the next tenant in tail. intestacy. The question arose in *Harrington v. Harrington*, but was not there decided, the opinion of Lord Cairns being in favour of an intestacy, and of Lord Westbury in favour of the transmission of the property within the limits of perpetuity. See L. R. 3 Ch. 564; *ib.*, 5 H. L. 87.

Bequests "in the same manner" as prior bequests. When a bequest has been made to several persons as tenants in common for life with remainder to their children and there is a subsequent gift to the same persons *in the same manner* as the prior bequest, the second bequest will be subject to the same limitations for life and remainders over. *Milsom v. Awdrey*, 5 Ves. 465; *Eames v. Anstee*, 33 B. 264; *Smith v. Greenhill*, 14 W. R. 912; *Giles v. Milsom*, L. R. 6 H. L. 24.

In *Sweeting v. Prideaux*, 2 Ch. D. 413, a subsequent gift for the life of the legatee only "in the same manner in every respect and subject to the same control" as the prior gift, was held on the language of the will to import the limitation in remainder of the prior gift to the children of the legatee. See *Auldjo v. Wallace*, 31 B. 193.

If, however, the original gift is directed to fall into the residue in default of children and the residue is then given to the same persons "in the same manner," these words will be referred, if possible, to a tenancy in common or separate use. *Shanley v. Baker*, 4 Ves. 731.

And where the original gifts are absolute, subject to executory gifts over, a subsequent gift to be held "in the same manner" as the prior gift will not import the executory gifts over if the words can be referred to a tenancy in common. *Lumley v. Robbins*, 10 Ha. 621; and see *Hare v. Hare*, 24 W. R. 575.

Gift by reference may import all the preceding gift. The referential words may, however, be strong enough to import all the limitations and restrictions of the preceding gift. *Ross v. Ross*, 2 Coll. 269; *Re Colshead*, 2

De G. & J. 690; *Re Shirley's Trusts*, 32 B. 394; *Ord v. Ord*, L. R. 2 Eq. 393. limitations of a prior gift.

When there is a gift to a class of persons living at a particular time and a subsequent gift to the same class without the restriction of being alive at the particular time, "in the same manner" as the prior gift, this will not cut down the class to take the second gift. *Yardley v. Yardley*, 26 B. 38; *Piggott v. Wildes*, 26 B. 90; *Re Wilder's Trusts*, 27 B. 418.

But there may be words which will have this effect. *Swift v. Swift*, 11 W. R. 334; 32 L. J. Ch. 479.

When property is given upon the same trusts as other property which is subject to a power to raise a definite sum, the property so given by reference is not subject to an additional charge of the same amount. *Hindle v. Taylor*, 5 D. M. & G. 577, 599; *Boyd v. Boyd*, 9 L. T. N. S. 166; 2 N. R. 486; *Baskett v. Lodge*, 23 B. 138; see *Sambourne v. Barry*, I. R. 11 Eq. 140. Reduplication of charges.

But if the power is to raise a charge not exceeding a certain proportion of the value of the property, the power to charge is increased in proportion by the value of the added property. *Cooper v. Macdonald*, 16 Eq. 258.

It may be noticed that a bequest to persons "before named" may refer to persons before mentioned, and will not without more be confined to persons expressly mentioned by name. *In re Holmes*, 1 Dr. 321; *Bromley v. Wright*, 7 Ha. 334. Gift to persons "before named."

## CHAPTER XLIII.

## EXECUTORY TRUSTS.

Executory  
trusts  
defined.

EVERY trust which requires a future conveyance or settlement is so far executory; but the mere fact that the testator contemplates a future settlement will not justify the Court in putting upon the words of a testator any other than their legal meaning.

When the testator, though contemplating the execution of a future instrument, declares the trusts upon which the property is to be held by reference to another instrument, those trusts are looked upon as incorporated into the will and must have their ordinary legal meaning. *Christie v. Gosling*, L. R. 1 H. L. 279; see *Viscount Holmesdale v. West*, L. R. 3 Eq. 474.

If the testator himself declares the trusts to be inserted in the contemplated settlement, the question then is, "whether he has been his own conveyancer," in which case the trusts declared by him must be literally followed, or whether the trusts declared by him are merely the headings of a future settlement, in which case they will be so carried out as to effectuate his intention. See *Egerton v. Earl of Brownlow*, 4 H. L. 1, 210; *Austen v. Taylor*, 1 Ed. 361; Amb. 376; *Boswell v. Dillon*, Dru. temp. Sug. 291; *In re Nelley's Trusts*, 26 W. R. 88.

Thus a direction to purchase lands to be held on the trusts declared with respect to other lands must be obeyed by literally adopting those trusts. *Austen v. Taylor*, 1 Ed. 361; Amb. 376.

In marriage articles the purpose of the instrument is itself sufficient to indicate the settlor's intention that the property is to go in strict settlement, but in a will an intention that words are not to have their strict meaning must appear from the instrument itself. Therefore, though the trust is executory, a direction to settle property on A. and the heirs of his body: *Seale v. Seale*, 1 P. W. 291; *Samuel v. Samuel*, 14 L. J. Ch. 222; 9 Jur. 222; or a devise in trust for A., with a direction to make a proper entail to the male heir by him, will not cut down A. to less than an estate tail. *Blackburne v. Stables*, 2 V. & B. 367; *Sweetapple v. Bindon*, 2 Vern. 536; *Harrison v. Naylor*, 2 Cox, 247; *Randall v. Daniell*, 24 B. 193; *Marshall v. Bousfield*, 2 Mad. 166; and see *Jervoise v. Duke of Northumberland*, 1 J. & W. 559.

Distinction between marriage articles and wills.

If, however, an intention is manifested not to use words in their strict legal sense, the trust will be executed so as to effect the general intention.

How far the rule in Shelley's case applies to executory trusts.

Such an intention is sufficiently indicated if the limitation is to A. for life, remainder to his heirs: *Meure v. Meure*, 2 Atk. 265; *Papillon v. Voice*, 2 P. Wms. 471; *Stonor v. Curwen*, 5 Sim. 264; *Hadwen v. Hadwen*, 23 B. 551; *Bastard v. Proby*, 2 Cox, 6; *Rochfort v. Fitzmaurice*, 2 D. & War. 1; *Trevor v. Trevor*, 1 H. L. 239; by a direction that the first taker should be unimpeachable for waste: *Papillon v. Voice*, 2 P. Wms. 471; *Fearne, C. R.* 115; by a direction that he shall not have power to bar the entail: *Leonard v. Earl of Sussex*, 2 Vern. 526; *Fearne, C. R.* 115; or that the property shall go over if the first taker dies without issue: *Shelton v. Watson*, 16 Sim. 543; *Thompson v. Fisher*, 10 Eq. 207; by the insertion of a general limitation to preserve contingent remainders not limited to a life: *Venables v. Morris*, 7 T. R. 342, 438; *Doe v. Hicks*, 7 T. R. 433; by a direction that a settlement shall be made as counsel shall advise and

that issue are to take in succession, and according to priority. *White v. Carter*, 2 Ed. 366.

And the same result, it seems, will follow if the general scope of the limitations shows that they were not to be literally adhered to. *Parker v. Bolton*, 5 L. J. Ch. 98; *Duncan v. Bluett*, I. R. 4 Eq. 469.

Direction  
to make a  
strict en-  
tail.

As to the effect of a direction to make a strict entail, see *Graves v. Hicks*, 11 Sim. 536; *Sealey v. Starwell*, I. R. 2 Eq. 326.

Direction  
to settle  
property to  
go with a  
title.

An executory trust to settle property upon such trusts as would correspond with the limitations of a barony granted by letters patent to several persons in succession and the heirs male of their bodies respectively, will be limited so as to give them only estates for life, the title being inalienable. *Sackville-West v. Viscount Holmesdale*, L. R. 3 Eq. 474, *ib.* 4 H. L. 543; *Lord Dorchester v. Earl of Effingham*, Sir G. Coop. 319; 10 Sim. 587, *n.*; 3 B. 180, *n.*; *Woolmore v. Burrows*, 1 Sim. 512; *Banks v. Baroness Le Despencer*, 10 Sim. 576.

The words  
"as far as  
the rules  
of law per-  
mit" will  
not make  
a trust  
executory.

It seems clear that where chattels are directed to go as heirlooms, with real estate "as far as the rules of law and equity permit," these words will not make the trust executory, or enable the Court to mould the limitations of the personalty. *Christie v. Gosling*, L. R. 1 H. L. 279.

Effect of  
such words  
where the  
trust is  
executory.

But if such a trust is clearly executory the Court will mould it so as to prevent the absolute vesting of chattels in a tenant in tail dying before coming into possession. See *Lady Lincoln v. Duke of Newcastle*, 12 Ves. 226, and see per Lord Chelmsford in *Christie v. Gosling*, L. R. 1 H. L. 290; *Sackville-West v. Viscount Holmesdale*, L. R. 4 H. L. 543.

If there are shifting clauses as to the realty which would be void for remoteness as to the personalty, they will be moulded so as to carry out the intention. *Miles v. Hurford*, 12 Ch. D. 691.

The Court will carry out in strict settlement an executory trust of family jewels directed to go as heirlooms to a succession of eldest sons "as far as the rules of law and equity will permit," though unconnected with limitations of real estate, and will insert provisoes against vesting in any person who does not become entitled to possession and attain twenty-one. *Shelley v. Shelley*, 6 Eq. 540.

A gift to a female legatee, followed by a direction to settle it on her upon marriage, probably imports no more than a separate use, so that the legatee, whether married or not, is entitled to payment on her separate receipt. *Laing v. Laing*, 10 Sim. 315; *Magrath v. Morehead*, 11 Eq. 491. See *Kennerley v. Kennerley*, 10 Ha. 160; *Munt v. Glynes*, 41 L. J. Ch. 639.

If the direction is to make a *strict* settlement, but no intention is shown to benefit children, the property will be settled upon the legatee in such a way as to exclude her husband and children. *Loch v. Bagley*, 4 Eq. 122.

If an intention is shown that the children of the legatee are to be benefited, the settlement will contain a power of appointment in the legatee with limitations in default of appointment in favour of children who, being males, attain twenty-one, or, being females, attain twenty-one or marry as tenants in common. *Young v. Macintosh*, 13 Sim. 445; *Stanley v. Jackman*, 23 B. 450; *Taggart v. Taggart*, 1 Sch. & L. 84; *Cogan v. Duffield*, 2 Ch. D. 44; see *Oliver v. Oliver*, 10 Ch. D. 765; *Eustace v. Robinson*, 7 L. R. Ir. 83; *Gowan v. Gowan*, 50 L. J. Ch. 248.

If the trustees have a discretion as to the form of settlement a power may be inserted enabling the legatee to appoint a life interest to a husband. *Charlton v. Rendall*, 11 Ha. 296.

Under a direction to settle for the benefit of the legatee and her issue to the exclusion of a husband, the ultimate

Direction  
to settle.

Direction  
to settle  
strictly.

Intention  
to benefit  
children.

Ultimate  
trusts.

trusts will be for the appointees of the legatee by will and in default of appointment for her absolutely. *Stanley v. Jackman*, 23 B. 450.

A covenant in executory marriage articles to settle real estate on issue will be carried out by successive limitations to the first and other sons, and so on. *Dod v. Dod*, Amb. 274; *Hart v. Middlehurst*, 3 Atk. 373; *Phillips v. James*, 13 W. R. 934; *In re Grier*, I. R. 6 Eq. 386.

In what cases tenants for life will be unimpeachable for waste.

In the execution of executory trusts by the Court the question arises whether the tenants for life are to be punishable for waste or not.

1. Where the executory trust is in such a form as would give the first taker an estate of inheritance, but the general object of the trust can only be effected by cutting down that estate to an estate for life, the life estates are made unimpeachable for waste. *Leonard v. Earl of Sussex*, 2 Vern. 526; *White v. Briggs*, 15 Sim. 17; 2 Ph. 583.

And, therefore, where estates are directed to go to the support of a title granted to a man and the heirs of the body, the estate of the first taker being cut down to a life estate in execution of the trust, will be punishable for waste. *Woolmore v. Burroughes*, 1 Sim. 512; *Bankes v. Le Despencer*, 10 Sim. 576; 11 Sim. 508; *Sackville-West v. Viscount Holmesdale*, L. R. 4 H. L. 548.

A direction that the trust is to be executed in strict settlement without more, *i.e.*, where no estate for life is expressly given, implies that the estates for life are to be punishable for waste. See *Davenport v. Davenport*, 1 H. & M. 775.

And, upon the same principle, if the trust is to be executed in strict settlement, powers which would diminish the estate will not be inserted under a direction to insert the usual powers. *Higginson v. Barneby*, 2 S. & St. 516; see *Sackville-West v. Viscount Holmesdale*, *supra*.



2. But if the testator has expressly, or by reference to other trusts, directed a life estate to be given, the power to commit waste will not be added to the life estate. *Davenport v. Davenport*, 1 H. & M. 775.

And if life estates are directed by the testator to be given, the words "in strict settlement" will not make the life estates dispunishable for waste. *Stanley v. Coulthurst*, 10 Eq. 259.

A direction to settle without power of anticipation is inconsistent with a power to commit waste. *Olive v. Olive*, 7 Ch. 433.

Property to be settled to the separate use of a married woman will be settled with a restraint upon anticipation. *Turner v. Sargent*, 17 B. 515; *Stanley v. Jackman*, 23 B. 450; *Re Dunnill's Will*, I. R. 6 Eq. 322; see *Symonds v. Wilkes*, 11 Jur. N. S. 659.

Real estate directed to be settled will be settled as realty. *Turner v. Sargent*, 17 B. 515.

A simple direction to settle will, it seems, authorise the insertion of powers of management, such as powers of leasing and sale and exchange. *Turner v. Sargent*, 17 B. 514; *Wise v. Piper*, 13 Ch. D. 848.

What powers will be inserted in a settlement executed by the Court.

And where "usual powers" are expressly authorised, powers of leasing, of sale and exchange, and, if necessary, of partition and of leasing mines and granting building leases, will be inserted, but not powers to confer personal privileges upon particular persons. *Peake v. Penlington*, 2 V. & B. 311; *Hill v. Hill*, 6 Sim. 136; see *Duke of Bedford v. Marquis of Abercorn*, 1 M. & Cr. 312, p. 334; *Higginson v. Burneby*, 2 S. & St. 516; *In re Grier*, I. R. 6 Eq. 386.

Where certain powers are given to tenants for life if qualified, and if not qualified, to trustees for them, general words will not authorise powers of sale and exchange. *Brewster v. Angell*, 1 J. & W. 625; *Horne v. Barton*, Jac. 437.

And where certain powers are given, general words will, as a rule, authorise only powers of a like nature ; they will not, for instance, authorise the insertion of a power to grant building leases when a power to lease is expressly given. *Pearse v. Baron*, Jac. 158.

The general words may, however, be so placed as to show that their generality is not to be controlled. *Lindon v. Fleetwood*, 6 Sim. 152.

## CHAPTER XLIV.

## IMPLICATION.

## IMPLICATION OF ESTATES TAIL.

IF there is a devise to A. simply or to A. for life, followed by a gift over in default of issue, if these words import an indefinite failure of issue, A. takes an estate tail. *Machell v. Weeding*, 8 Sim. 4; *Daintry v. Daintry*, 6 T. R. 307; *In re Banks' Trusts*, 2 K. & J. 387.

Gift over upon an indefinite failure of issue gives the ancestor an estate tail.

And in wills before the Wills Act, if the limitation is to A. simply, or to A. for life, with a gift over in default of issue, A. will take an estate tail, though there are words which might constructively limit the failure of issue within a definite period, since this is the only construction which will carry anything to the issue. *Wyld v. Lewis*, 1 Atk. 432; *Simmons v. Simmons*, 8 Sim. 22, where the devise was in effect to A. for life, and if she dies without issue over, the power to appoint to issue being merely discretionary. *Butt v. Thomas*, 11 Ex. 235; 1 H. & N. 109.

The Court will not constructively limit the failure of issue, so as to prevent the implication of an estate tail.

*Quære* whether an estate tail will be implied in a person from a gift over in default of his issue simply, where no interest is given to him by the will. *Parker v. Tootal*, 11 H. L. 143; see *Walter v. Drew*, Com. Rep. 373.

Whether an estate tail will be implied from a gift over in default of a person who takes nothing under the will.

And where, in a devise to A. for life, remainder to his children either for life or in tail, an estate tail is implied in A. from a gift over in default of issue, the estate tail so implied will be in remainder, to take effect after the

prior estates expressly limited. *Doe d. Bean v. Halley*, 8 T. R. 5; *Doe d. Gallini v. Gallini*, 5 B. & Ad. 621; 3 Ad. & E. 340; *Forsbrook v. Forsbrook*, L. R. 3 Ch. 93; *Andrew v. Andrew*, 1 Ch. D. 410.

As between father and son, an estate tail will be implied in the father.

And where an estate tail is to be implied either in an ancestor or his issue, it will be implied in the ancestor, so as to take in the whole line of issue. *Atkinson v. Barton*, 10 H. L. 213; *Forsbrook v. Forsbrook*, *supra*.

### IMPLICATION OF LIFE ESTATES.

Devise to the heir-at-law after the death of A., gives A. a life estate.

I. If there is a devise of realty to the heir-at-law after the death of A., A. will take an estate for life by implication. It is evident that the heir who would take in case of intestacy is not meant to take immediately, and the only way of carrying out the testator's intention is to give A. a life estate. "A. must have the thing devised or none else can have it." *Gardner v. Sheldon*, Vaughan, 259; Tudor, L. C. 541.

But a devise to a stranger after the death of A. gives A. no estate by implication, since the heir-at-law may have been intended to take in the meantime. *Aspinall v. Petvin*, 1 S. & St. 544.

Person to take on the death of A. must be heir at date of devise.

In order that A. may take a life estate the person to whom the lands are given after the death of A. must be the heir-at-law at the time of the devise, and not at the time when the devise takes effect. *Aspinall v. Petvin*, *supra*.

Devise at the death of A. to one of several co-heiresses.

Similarly, a devise to one of several co-heiresses after the death of A. gives A. a life estate. *Hutton v. Simpson*, 2 Vern. 723, as stated in *King v. Ringstead*, 9 B. & C. 218, p. 228.

Devise at the death of A. to the heir and others.

The rule does not apply where the devise is to the heir and others after the death of A. *Ralph v. Carrick*, 11 Ch. D. 873.

The express gift of certain lands to A. does not in itself prevent him from taking other lands by implication. See 13 H. 7, f. 17; Brook, Devise, pl. 52, cited in *Gardner v. Sheldon*, Vaughan, 259; Tudor, L. C. 541, 547.

Whether an express devise to A. will prevent him from taking by implication.

Therefore, where lands are devised to A. for life, and after the death of A. the lands previously devised, together with other lands, are devised to B., A. will or will not take an estate for life by implication in the other lands, according as B. is the heir or a stranger. *Aspinall v. Petvin*, 1 S. & St. 544; *King v. Ringstead*, 9 B. & C. 218; *Attwater v. Attwater*, 18 B. 330.

But words which taken in their grammatical sense are joint and apply to the two classes of property, will be construed distributively if the intention of the testator is manifest that the lands not expressly devised for life are to go to the devisees at once. *Cook v. Gerard*, 1 Saund. 183, cit. 9 B. & C. 225; *Simpson v. Hornsby*, 2 Vern. 723; Prec. Ch. 439, 452; *Doe v. Brazier*, 5 B. & Ald. 64.

Distributive construction where lands, in some of which A. takes a life estate, are given at his death to the heir.

The mere fact that provision has already been made for A. will be an argument against giving a life estate by implication, and therefore in favour of a distributive construction. See *Stevens v. Hale*, 2 Dr. & Sm. 22; *James v. Shannon*, 1 R. 2 Eq. 118.

Of course, if the devise after the death of A. can be construed as merely postponing the vesting in possession till the death of A., no argument in favour of implication can arise. *Barnet v. Barnet*, 29 B. 239.

No implication where possession postponed till A.'s death. Effect of a residuary devise.

And in the same way, if there is a residuary devise, so that nothing is undisposed of, there can be no implication. *Horton v. Horton*, Cro. Jac. 74.

II. By analogy to the rule with regard to real property, it appears that if personal property be given to the next of kin, or to one of the next of kin after the

Bequest of personalty to the next of kin after A.'s death.

death of A., A. will take a life interest by implication, if there is no residuary bequest. *Stevens v. Hale*, 2 Dr. & Sm. 22; *Cock v. Cock*, 21 W. R. 807; *Blackwell v. Bull*, 1 Kee. 176. In *Horton v. Horton*, Cro. Jac. 74, there was in effect a residuary bequest according to the then state of the law.

A life interest will not be implied in A. where the persons to take on his death are not the next of kin or are the next of kin along with other persons. *Ralph v. Carrick*, 11 Ch. D. 873.

In order to imply a life interest in A. there must be something more than a mere gift after his death. Some of the earlier cases in which a life interest has been implied would probably not now be followed. See *Roe v. Summerset*, 5 Burr. 2608; *Bird v. Hunsdon*, 2 Sw. 342; *Humphreys v. Humphreys*, 4 Eq. 475.

Implication in marriage settlement.

In the case of marriage settlements settling property on the wife during coverture and providing for her death during the husband's life, with limitations after the death of the survivor, but containing no provision for the event of the wife surviving the husband, a life interest has in that event been implied in the wife. *Tunstall v. Trappes*, 3 Sim. 312; *Allin v. Crawshay*, 9 Ha. 382.

Intention to give life interest.

So in wills after a life interest to A., with a life interest in certain events to B., followed by a gift over after the death of A. and B., a life interest has been implied in B. though the events did not happen. *In re Betty Smith's Trusts*, 1 Eq. 79; *In re Blake's Trust*, 3 Eq. 799; see *Isaacson v. Van Goor*, 42 L. J. Ch. 193; 21 W. R. 156.

Where the testator's widow was directed to carry on the testator's business and after his death he directed his property to be divided among his children, the widow took a life interest in the property upon the general intention to keep the family together. *Blackwell v. Bull*, 1 Keen. 176; see *Cockshott v. Cockshott*, 2 Coll. 432.

A residuary bequest or a gift in default of appointment where the bequest after the life of A. is made under a power, affords an argument against the implication of a life interest. *Cranley v. Dixon*, 23 B. 512; *Henderson v. Constable*, 5 B. 297.

There is no implication in favour of A. where the gift is if A. dies under twenty-one or unmarried, since in such a case an absolute interest and not a life estate would have to be implied. *James v. Shannon*, I. R. 2 Eq. 118; *Harris v. Du Pasquier*, 20 W. R. 668.

Effect of a residuary bequest.

No implication arises in favour of A., where the gift is, if A. dies under 21, to B.

#### IMPLICATION OF ABSOLUTE INTERESTS.

1. If there is a gift to A. till twenty-one with a gift over if he dies under twenty-one, A. will take by implication the fee or an absolute interest in personalty, defeasible upon death under twenty-one. *Tomkins v. Tomkins*, cited 1 Burr. 234; *Paylor v. Pegg*, 24 B. 105; *Gardiner v. Stevens*, 30 L. J. Ch. 199; *In re Harrison's Estate*, 5 Ch. 408.

Devise to A. till 21, with a gift over if he dies under 21.

The argument in favour of implication is strengthened if the residuary devisees are different from those who would take under the gift over, so that without implication the property would go to different persons, according as A. died under or over twenty-one. *Cropton v. Davies*, L. R. 4 Ex. 159.

2. A simple gift to trustees in trust for A. till he attains twenty-one will not give A. the absolute interest. *In re Hedley's Trusts*, 25 W. R. 529; see *McCutcheon v. Allen*, 5 L. R. Ir. 268.

Gift till 21.

But very slight indications of intention have been held sufficient to give the absolute interest, though possibly some of the earlier decisions may be difficult to support.

In some cases the Court has found a direct gift to the

legatee, with a superadded direction that it was to be in trust till he should come of age. *Atkinson v. Paice*, 1 B. C. C. 91; *Hale v. Beck*, 2 Eden. 229; see *Tunaley v. Roch*, 3 Dr. 720.

In others an absolute interest has been implied from a direction that the trust is to cease at twenty-one, or from a reference to the trustees as trustees for the legatees. *Peat v. Powell*, Amb. 387; 1 Eden. 479; *Wilks v. Williams*, 2 J. & H. 125.

Or, again, an absolute interest has been given because the trustees are directed to apply not only the interest but the produce till the legatees attain twenty-one. *Newland v. Shephard*, 2 P. Wms. 194.

Effect of a gift to A. till twenty-one, for the benefit of himself and another.

3. But the implication will be rebutted if there are circumstances tending to show that the person to take till twenty-one is not to take an absolute interest if he survives twenty-one; if, for instance, the gift is to the wife for her and her son's support till the son attains twenty-one, and if he dies under twenty-one, to the wife for life, and then over. In this case the son did not take the whole interest till twenty-one, and it could therefore hardly be implied that he was to take the whole after that age to the exclusion of his mother. *Fitzhenry v. Bonner*, 2 Dr. 36.

No implication in favour of children arises in a gift to A. absolutely, and if he dies without children over.

4. No implication in favour of children arises upon an absolute gift of personalty to A. and if he dies without children over, or upon a gift to several as tenants in common and if any die without issue their shares to those then living or their children. *Addison v. Buek*, 14 B. 459; 2 D. M. & G. 810; *Cooper v. Pitcher*, 4 Ha. 485; 16 L. J. Ch. 24; *Dowling v. Dowling*, L. R. 1 Eq. 442; *ib.*, 1 Ch. 612.

Gift to A. for life, and if he dies with-

5. Nor does any implication in favour of children arise if the gift is to A. for life and if he dies without children over. *Greene v. Ward*, 1 Russ. 262; *Ranelagh v.*



*Ranelagh*, 12 B. 200; *Sparks v. Restall*, 24 B. 218; *Neighbour v. Thurlow*, 28 B. 33; *Re Hayton's Trusts*, 4 N. R. 54; *Seymour v. Kilbee*, 3 L. R. Ir. 33. out children over.

So in the case of real estate, a gift over in default of issue of A. following limitations to A. for life with remainder to his first son for life, with remainder to the first son of the first son in tail, with remainder to every other son of A. successively for like interests, will not give the second and other sons of the first son of A. estates by purchase. *Monypenny v. Dering*, 7 Ha. 568.

6. But though after a gift to A. for life the mere gift over in default of children will not be sufficient to give the children any interest by implication, the Court will, it seems, lay hold of any indication of intention to fortify the argument based upon the gift over, so as to give the children an interest. In the former case, where the absolute interest is given to the first takers, the "mere fact of a testator giving over property in case there are no children does not furnish any presumption on which this Court can act in favour of his giving it to the children, if there are any, as against their parents." *Dowling v. Dowling*, L. R. 1 Ch. 615. But where the parent takes only a life interest the children can take nothing from him, and at the same time the presumption against intestacy arises. It seems *Ex parte Rogers*, 2 Mad. 449, may be supported on this ground; see, too, *Kinsella v. Caffray*, 11 Ir. Ch. 154, where the gift over was not merely on death without issue, but upon such death, or upon death leaving issue, and such issue dying under twenty-one.

7. Possibly where there is a gift to A. to dispose of among a certain class by deed or will, a life interest would be implied in A. *Acheson v. Fair*, 3 D. & War. 527. See *Williams v. Roberts*, 27 L. J. Ch. 177; 4 Jur. N. S. 18; and p. 384, *ante*. Gift to A. to dispose of among a certain class at his death.

Bare power to appoint to A.

8. A bare power to appoint a sum of money to a particular person will not give that person any interest if the power is not exercised. *Bull v. Vardy*, 1 Ves. J. 270; see *Tweeddale v. Tweeddale*, 7 Ch. D. 633.

Power to select certain number.

It would seem that under a power to select a certain number out of a class there is no gift by implication in default of appointment. See *Carthew v. Enraght*, 20 W. R. 743.

Wide discretion not exercised.

If a wide discretion is given to trustees to apply a fund in the maintenance of a son or in augmentation of the shares of the other children there is no implied gift if the trustees refuse to exercise their discretion. *Re Eddowes*, 1 Dr. & Sm. 395.

Power in nature of a trust.

If the power is so framed as to impose upon the donee the duty of exercising it his failure to do so will not prejudice the beneficiaries. *Brown v. Higgs*, 8 Ves. 561; *Burrough v. Philcox*, 5 M. & Cr. 72.

Power to tenant for life.

And in the ordinary case of a bequest for life with power to the tenant for life to appoint at his death among a class, though the words in which the power is framed may not impose a trust, it seems the beneficiaries who might have taken under the power will take by implication in default of appointment.

At any rate, this is the case if there is a gift over in default of objects of the power. *Butler v. Gray*, 5 Ch. 26; see *Kellett v. Kellett*, 1 R. 5 Eq. 298.

This principle does not apply if there is a gift over in default of appointment. *Pattison v. Pattison*, 19 B. 638; *Roddy v. Fitzgerald*, 6 H. L. 823; and see *In re Jeffery's Trusts*, 14 Eq. 136.

Nor does it apply where the power is to be exercised only in events which never happen. *Halfhead v. Shepherd*, 28 L. J. Q. B. 248; 5 Jur. N. S. 1162.

## IMPLICATION OF CROSS-REMAINDERS.

1. If there is a devise of lands to two or more as tenants in common and the heirs of their bodies respectively, followed by a gift over in default of such issue, the gift over takes effect only in default of all such issue as would take under the antecedent limitations, and therefore cross-remainders are implied between the tenants in tail. *Doe d. Gorges v. Webb*, 1 Taunt. 234; *Powell v. Howells*, L. R. 3 Q. B. 655; *Hannaford v. Hannaford*, L. R. 7 Q. B. 116.

Cross-remainders implied in devise to several in tail, with gift over in default of issue to take under preceding limitations.

And if the gift over is limited not expressly in default of issue, but as a remainder, the same result follows. *Doe d. Burden v. Burville*, 2 East, 47, n.

Where the gift over is limited as a remainder or reversion.

The word reversion would probably now be held to have the same force, notwithstanding *Pery v. White*, Cowp. 777.

The arguments against the implication of cross-remainders, founded upon the number of the devisees and such words as severally or respectively, or the fact that *the whole* is not expressly given over, must now be considered as exploded.

2. The result will be the same if the gift over is in default of issue to take under the preceding limitations, living at the death of their parents. *Maden v. Taylor*, 45 L. J. Ch. 569.

Gift over in default of issue living at deaths of ancestors.

3. It has been said that if cross-remainders are provided between certain objects in certain events, the implication of cross-remainders between those objects in different events does not arise; so that, for instance, if cross-remainders are provided between the children of separate families among themselves, cross-remainders would not be implied between the children of one family and those of the other. *Claché's case* (Dyer, 330), however, which is

Whether the limitation of cross-remainders in certain events prevents the implication of cross-remainders.

usually cited on this point, is no authority for any such proposition. All that case decides is, that cross-remainders cannot be implied in the face of an express limitation over in a certain event with which such an implication would be inconsistent. See the remarks by the Lord Justice Turner in *Atkinson v. Barton*, 3 D. F. & J. 339. And the decision in *Rabbeth v. Squire*, 19 B. 77; 4 De G. & J. 406, was based on totally different grounds. The true rule is laid down by Turner, L.J.:—"Cross-remainders are to be implied or not according to the intention. The circumstance of remainders having been created between the parties in particular events is a circumstance to be weighed in determining the intention, but is not decisive upon it." *Atkinson v. Barton*, 3 D. F. & J. 339 (reversed on appeal, but on different grounds, 10 H. L. 313); see, too, *Vanderplank v. King*, 3 Ha. 1; *Re Ridge's Trusts*, 7 Ch. 665.

Cross-remainders implied between persons taking different interests.

4. Cross-remainders will be implied even though, as the result of legal rules and not of the testator's intention, the class of persons between whom they are implied take different interests; if, for instance, some are tenants in tail, others only tenants for life, with remainders to their children in tail. *Vanderplank v. King*, 3 Ha. 1.

Cross-remainders implied between tenants for life.

5. Cross-remainders will be implied in a devise to the children of A., which carries to them only a life estate, with a gift over for want of such issue of A. *Ashley v. Ashley*, 6 Sim. 358.

Cross-remainders implied between the families where the limitations are for life, with remainder to children.

6. And where realty or personalty is given to several persons as tenants in common for life with remainders to their issue, followed by a gift over if all should die without leaving issue, cross-limitations between the first takers and their families will be implied. *Re Ridge's Trusts*, 7 Ch. 665; *Re Clark*, 11 W. R. 871; see, too, *Coates v. Hart*, 3 D. J. & S. 504.

Cross-limitations.

7. But cross-limitations will not be implied so as to

divest vested interests. The implication arises from the presumption against intestacy, but where there are vested interests there can be no intestacy. See *Rabbeth v. Squire*, 19 B. 70; 4 De G. & J. 406; *Re Clark*, 11 W. R. 871. tations will not be implied so as to divest vested interests.

Upon the same principle, when the testator has disposed of his whole interest in realty or personalty; if, for instance, absolute vested interests have been given to several as tenants in common, with a gift over upon the death of all in certain events; cross-limitations cannot be implied between them, as there can be no intestacy, and cross-limitations would divest vested interests. *Skey v. Barnes*, 3 Mer. 334; *Bromhead v. Hunt*, 2 J. & W. 459; *Baxter v. Losh*, 14 B. 612; *Beaver v. Nowell*, 25 B. 551.

8. If, however, the interests are not vested, but contingent with a gift over upon the death of all before the interests vest, the argument against an intestacy applies, and no argument can be raised against cross-limitations on the ground that they would divest vested gifts, and therefore in all probability cross-limitations would be implied. *Mackell v. Winter*, 3 Ves. 236, 536; *Scott v. Bargeman*, 2 P. Wms. 68; 2 Eq. Abr. 542; *Graves v. Waters*, 10 Ir. Eq. 234. Gift over of contingent interests, if all the legatees die before the time of vesting.

There are no grounds for supposing *Scott v. Bargeman* to be overruled. The point in *Beauman v. Stock*, 2 Ba. & Be. 406, was totally different. It was whether benefit of survivorship would be implied between tenants in common taking vested interests, and the incidental remarks of Lord Manners cannot be considered as overruling a case expressly approved by Lord St. Leonards in *Vize v. Stoney*, 1 Dr. & War. 348, and followed in *Graves v. Waters*.

## IMPLICATION BY RECITAL.

A recital that a person is entitled under another instrument.

1. A recital, that a person is entitled under another instrument, when he is not in fact entitled, does not in general amount to a gift by the instrument which contains the recital. *Harris v. Harris*, 1 R. 3 Eq. 610; *Circuit v. Perry*, 23 B. 275.

Recital of a supposed gift by the reciting instrument.

2. But a recital that the testator has by the very document containing the recital made a particular gift, which he has not in fact made, is evidence of an intention to confer the bounty. *Adams v. Adams*, 1 Ha. 537.

Gift in addition to a supposed gift.

Thus a gift alleged to be "in addition" to a prior gift, where there is in fact no such prior gift, is sufficient evidence of an intention to confer the supposed prior gift. *Jordan v. Fortescue*, 10 B. 259; *Farrar v. St. Catherine's Coll.*, 16 Eq. 24.

So a statement that the testator does not give a legatee a certain sum because she is absolutely entitled to it, when in fact it is in the disposition of the testator, amounts to a gift of the sum in question. *Hall v. Leitch*, 9 Eq. 376.

But a mere recital in a codicil of a supposed gift by will will not amount to a gift. *Re Arnold's Estate*, 33 B. 163, 171.

In order that a recital may operate as a gift, it must be clear that there is nothing to which it may refer.

3. In order that rule 2 may apply it must be clear that there is nothing in the will to which the recital can refer. *Sherratt v. Oakley*, 7 T. R. 492; *Smith v. Fitzgerald*, 3 V. & B. 2; *Mackenzie v. Bradbury*, 35 B. 617, 620; *Nugent v. Nugent*, 1 R. 8 Eq. 78; *Ives v. Dodgson*, 9 Eq. 401.

Recital will not cut down a prior express gift.

4. Still less can a gift be implied from a recital when the effect of such implication would be to cut down a prior express gift, as from a recital of a gift to B. for life, remainder to his children, when in fact the prior gift was to the children immediately. *Re Smith*, 2 J. & H. 594.

## CHAPTER XLV.

## REVOCATION.

PRIOR to the Wills Act a devise was revoked if the testator afterwards made a conveyance of the land for any purpose (except a mortgage), though the conveyance was only of the legal estate. *Lord Lincoln's Case*, Show. P. C. 154; 1 Eq. Ab. 411, pl. 11; 1 Jarman, 136—141; 4th Ed. 150.

Revoca-  
tion before  
the Wills  
Act.

Partition was no exception to the general rule where a conveyance was made to a trustee to divide, though, if the partition was effected by a mere release to uses, there was no revocation. *Grant v. Bridger*, L. R. 3 Eq. 347.

Now, by the 23rd section of the Wills Act, it is provided that no conveyance or other act made or done subsequently to the execution of a will of or relating to any real or personal estate therein comprised, except an act by which such will shall be revoked as aforesaid, shall prevent the operation of the will with respect to such estate or interest in such real or personal estate, as the testator shall have power to dispose of by will at the time of his death.

Effect of  
the 23rd  
section of  
the Wills  
Act.

This section applies to cases in which a gift would have been formerly revoked by alteration of estate, but not to cases of ademption. *Moor v. Raisbeck*, 12 Sim. 123; *Ford v. De Pontes*, 30 B. 572.

The sec-  
tion does  
not apply  
to cases of  
ademp-  
tion.

The subject of revocation of testamentary instruments has been treated *ante*, pp. 35—47. The cases upon revocation as a question of construction are so special

that they are of little use as general authorities, and hardly admit of a satisfactory classification.

The following general rules may, however, be laid down with regard to revocation:—

It must be reasonably clear that a bequest is meant to be revoked.

1. To cut down a previous gift it must be reasonably clear that it was meant to be cut down. The rule is not that the words of revocation must be as clear as the words of original gift. See *Randfield v. Randfield*, 8 H. L. 225; *Wallace v. Seymour*, 20 W. R. 334; *Beamish v. Beamish*, 1 L. R. 1r. 501.

Thus, if property is given to A. for life with remainder for her children, and by a codicil all gifts in favour of A. are revoked, the remainder to the children remains. *Green v. Tribe*, 27 W. R. 39.

On the other hand, where property is given to A. for life with remainders over and the gift to A. only is revoked, but the property is given absolutely to B, the whole original gift is revoked. *Murray v. Johnstone*, 3 D. & War. 143; *Fry v. Fry*, 9 Jur. 894; see *Wells v. Wells*, 2 W. R. 6; 17 Jur. 1020; *Hargreaves v. Pennington*, 12 W. R. 1047.

So, when there is a gift to A. with executory limitations over, and the trusts of the will as regards the gift to A. are revoked, the gifts over are revoked as well. *Boulcott v. Boulcott*, 2 Dr. 25.

Gifts will not be considered revoked further than is necessary.

2. The dispositions of the will will not be disturbed more than is necessary to give effect to a revocation by codicil.

Thus, where a legacy is charged on real and personal estate and the charge on the personal estate is revoked by a codicil, the charge on the realty remains. *Kermode v. Macdonald*, 3 Ch. 585; *Leese v. Knight*, 12 W. R. 1097.

Where a legacy is charged on two funds, one of which is afterwards by a codicil given free from the charge, the



charge remains on the other fund and does not abate in the proportion of the two funds. *Tatlock v. Jenkins*, Kay, 654.

So, too, when land is given subject to a charge to A., and the devise is afterwards revoked, the charge remains. *Beckett v. Harden*, 4 Mau. & S. 1; see *Grice v. Funnell*, 1 Sm. & G. 130.

A legacy which is revoked is not set up again because the disposition in favour of which the revocation is made is incomplete or incapable of taking effect. *Tupper v. Tupper*, 1 K. & J. 665; *Nevill v. Boddam*, 28 B. 584; *Quinn v. Butler*, 6 Eq. 225; see *Onions v. Tyrer*, 1 P. Wms. 343; 2 Vern. 741; *Baker v. Story*, 23 W. R. 147; see *ante*, Ch. VI., p. 37.

When personalty is directed to go upon the same trusts as realty and the trusts of the realty are afterwards revoked, the gift of the personalty remains. *Lord Beauclerk v. Mead*, 2 Atk. 167; *Darley v. Longworth*, 3 B. P. C. 359; *Agnew v. Pope*, 1 De G. & J. 49; *Martineau v. Briggs*, 23 W. R. 889; *Bridges v. Strachan*, 26 W. R. 691. *Lord Carrington v. Payne*, 5 Ves. 404, would probably not be followed. See *Re Gibson*, 2 J. & H. 656.

Personalty directed to go upon the trusts of realty which are revoked.

But if the gift is of money to be laid out in repairing certain premises and the surplus is given to the same persons to whom the premises are devised and this latter devise is revoked, the gift of personalty also fails. *Whiteway v. Fisher*, 9 W. R. 433.

3. A gift by will is not revoked by an erroneous recital of it by a codicil. *Re Smith*, 2 J. & H. 594; *Mann v. Fuller*, Kay, 624.

Erroneous recital will not revoke a gift.

4. An alteration or addition to a gift in a will expressed to be made upon an assumption of fact, which turns out to be erroneous, does not take effect. *Campbell v. French*, 3 Ves. 321; *Doe d. Evans v. Evans*, 2 Per. & D. 378; 10 Ad. & E. 228; *Barclay v. Maskelyne*, Johns. 124.

Revocation owing to an erroneous assumption of fact.

But if the alteration or addition is made because the testator is doubtful whether some fact is true or not, the alteration takes effect. *A.-G. v. Lloyd*, 3 Atk. 552; 1 Ves. sen. 32; *A.-G. v. Ward*, 3 Ves. 327.

The distinction seems to be not between the fact and the testator's belief in the fact, but between a fact and a possibility which the testator is unable to verify, and therefore an additional gift founded upon an erroneous belief would fall under the former head. *Thomas v. Howell*, 18 Eq. 198.

## INCONSISTENCY.

The later  
of two in-  
consistent  
gifts takes  
effect.

When two clauses in a will are absolutely irreconcilable the later one is to be preferred. *Crone v. Odell*, 1 Ba. & B. 449; 3 Dow. 61; *Ulrich v. Lichfield*, 2 Atk. 372; *Morrall v. Sutton*, 1 Ph. 533; *Paice v. Archbishop of Canterbury*, 14 Ves. 366.

But if possible the Court will reconcile two dispositions apparently inconsistent. See *Kerr v. Baroness Clinton*, 8 Eq. 462.

Gift of the  
same prop-  
erty to  
two per-  
sons.

Thus, if the same property is given to two persons in fee in two different parts of the will, they will take as joint tenants. *Paramour v. Yardley*, Plow. 541; *Bennett's Case*, Cro. Eliz. 9; see *Sherratt v. Bentley*, 2 M. & K. 149, 162.

This does not, however, apply as between will and codicil. *Re Hough's Estate*, 15 Jur. 943; 20 L. J. Ch. 422; *Evans v. Evans*, 17 Sim. 107.

So, too, if land is given to one person without and to another person with words of limitation, the latter will take a fee in remainder. *Gravenor v. Watkins*, L. R. 6 C. P. 500.

Similarly where immediate interests in fee and in tail or in fee and for life are given in the same lands, the devise of the fee will be construed as a remainder whether the devise of particular estate precedes the devise of the fee or not. *Wallop v. Derby*, Yelv. 209; see *Conquest v Conquest*, 16 W. R. 453.

In cases where the whole personalty is given to a person absolutely and then there is a gift of the residue at her decease, the earlier gift has been held to be for life only. *Sherratt v. Bentley*, 2 M. & K. 149; *Re Brook's Will*, 13 W. R. 573; *Hare v. Westropp*, 9 W. R. 689. Gifts of the testator's whole estate, and of a residue in the same will.

And the same construction has been adopted where there were no words referring to the death of the first legatee, but the gift was to her children. *In re Bagshaw's Trusts*, 24 W. R. 875; 25 W. R. 659; 46 L. J. Ch. 567.

So, if a testator gives the remainder of his property to A. and makes B. his residuary legatee, B. will take only lapsed legacies. *Re Jessop*, 11 Ir. Ch. 424; *Dawes v. Bennett*, 30 B. 226; *Kelvington v. Parker*, 21 W. R. 121. Gifts of the residue and of the remainder in the same will.

But a residuary gift by codicil revokes a residuary gift by will. *Earl of Hardwicke v. Douglas*, 7 C. & F. 795.

Similarly, a gift of all the testator's property, followed by gifts of specific portions of it or *vice versa*, may both take effect. *Cuthbert v. Lempriere*, 3 Mau. & S. 158; *Doe d. Snape v. Nevile*, 11 Q. B. 466; *Blamire v. Geldart*, 16 Ves. 314; *In re Arrowsmith's Trusts*, 8 W. R. 555; 2 D. F. & J. 474; *Robertson v. Powell*, 3 N. R. 433. Gifts of all the testator's property, followed by gifts of portions of it.

Where, however, all the testator's personal property was given to his widow for life, subsequent legacies were held to be not payable till after her death. *Burdett v. Young*, 9 Mad. 93; 5 B. P. C. 54.

As between a will and codicil, however, the argument As be-

tween will and codicil, the argument is in favour of revocation. is much stronger in favour of revocation. At any rate, where a testator by his will distinguishes between specific legacies and residue and by a codicil gives all his personal property, the codicil revokes the specific legacies as well as the residuary gift. *Kermode v. Macdonald*, L. R. 1 Eq 457; 3 Ch. 584.

## CHAPTER XLVI.

## ALTERING WORDS.—UNCERTAINTY.

## CHANGING WORDS.

THE Court will change a word when it appears from the context of the will that the word was incorrectly employed by the testator in place of some other word.

Several cases in which "or" has been changed into "and," and *vice versa*, have already been mentioned in the discussion of the construction of gifts over. It remains to mention some cases in which a similar change has been made in direct gifts.

When there is a gift to a person upon one or other of two events, "or" will not be read "and," as the result would be to make the conditions cumulative instead of alternative. *Hawksworth v. Hawksworth*, 27 B. 1.

And it seems in a condition precedent to vesting "nor" will mean "or not," if the result is to vest the gift in either of two events. *Mackenzie v. King*, 12 Jur. 787; 17 L. J. Ch. 448.

On the other hand, in some cases on the context of the will "and" has been read "or," so as to vest a gift in alternative in lieu of cumulative events. *Hawes v. Hawes*, 1 Ves. sen. 13; *Jackson v. Jackson*, 1 Ves. sen. 216; *Stapleton v. Stapleton*, 2 Sim. N. S. 212, with which compare *Malmesbury v. Malmesbury*, 31 B. 407; *Maynard v. Wright*, 26 B. 285.

"Or" will not be changed into "and" in a condition precedent.  
"Nor" may mean "or not."

"And" changed into "or" upon the context.

"Fourth"  
changed  
into  
"Fifth."

Upon the same principle the Court has changed the word fourth into fifth, where it was clear upon the construction of the whole will that the testator intended to refer to the fifth and not to the fourth schedule. *Hart v. Tulk*, 2 D. M. & G. 300. See *Surtees v. Hopkinson*, 4 Eq. 98; *Smith v. Crabtree*, 6 Ch. D. 591.

### SUPPLYING WORDS.

With regard to supplying words in a will the rule seems to be that where the will as it stands is clearly inconsistent, so that the choice lies between rejecting some portion of it or supplying some word, while at the same time the latter course will make the will consistent, the Court will be justified in making the necessary addition. See *Hope v. Potter*, 3 K. & J. 206; *In re Morony*, 1 L. R. Ir. 483.

Limitation  
to the  
second and  
other sons  
supplied.

Thus, in a devise to A. for life, remainder "to the first son of A. severally and successively in tail male," the devise will be construed as to the first and other sons of A. *Parker v. Tootal*, 11 H. L. 143. See *Newburgh v. Newburgh*, Lord St. Leonards' Law of Property, 367.

Under a bequest in trust for the testator's widow for her life in trust for his children, followed by powers of maintenance and advancement after the widow's death, with an ultimate gift over after her death in default of children attaining vested interests, the Court supplied the words "and after her death" after the words "for her life." *Greenwood v. Greenwood*, 5 Ch. D. 954.

Limitation  
to daugh-  
ters sup-  
plied in a  
marriage  
settle-  
ment.

So, too, where there was a limitation in a settlement to the children of the marriage who being a son or sons should attain twenty-one years; and if there should be but one such child, the whole to be in trust for such one

child, his *or her* executors and administrators, and there were powers of applying the presumptive share of every such child for his *or her* maintenance until his *or her* share should become vested, the Court held daughters to be included in the gifts. *In re Daniel's Settlement Trusts*, 1 Ch. D. 375.

In a somewhat similar case, where there were limitations to daughters for life with remainder to their children, and the limitation to the children of one daughter was omitted, it was supplied upon the general intention of the will. *In re Redfern; Redfern v. Bryning*, 6 Ch. D. 133.

So when there is a gift to A. in tail, and if he die over, the words "without issue" will be supplied in the gift over to satisfy the implied contingency. *Anon.* 1 And. 33.

And in a similar case, where there were devises to several in tail and the interest of one of the tenants in tail was given over to another, "if he died living Alice," the words "without issue" were supplied, there being a gift over of the whole upon death of all the tenants in tail without issue. *Spalding v. Spalding*, Cro. Car. 185.

The extreme limit to which the Court will go in supplying words in such cases is probably marked by *Abbott v. Middleton*, 7 H. L. 68. The gift there was of personalty to the testator's wife for life and then to his son for life with remainder to the son's children and "in case of my son dying before his mother" over. The son died, leaving a child, and the House of Lords held (diss. Lords Cranworth and Wensleydale) that the words "without children" must be supplied in the gift over, so as to leave the child of A. in possession of the property.

However, if the testator expressly distinguishes death in the lifetime of a tenant for life from death without issue; if, for instance, the gift over is either in the event of death

The words  
"without  
issue"  
supplied,  
so as not  
to divest a  
prior estate  
tail.

*Abbott v.  
Middleton.*

before the tenant in tail or in the event of death without issue at any time, the gift over must be literally construed. *Eastwood v. Lockwood*, L. R. 3 Eq. 487.

Where a testator bequeathed the remainder of his property "and any other property of which I may die possessed, and I nominate my son my executor," it was held that the residue was undisposed of. *Driver v. Driver*, 43 L. J. Ch. 279.

### UNCERTAINTY.

If it is impossible to ascertain the subject-matter or the objects of a gift, it will be void for uncertainty.

A bequest of indefinite amount is void.

Thus, a gift of some of my linen, not saying how much, or of a handsome gratuity, is void. *Peck v. Halsey*, 2 P. Wms. 387; *Jubber v. Jubber*, 9 Sim. 503. See *Jones d. Henry v. Hancock*, 4 Dow. 145.

On the other hand, if the testator supplies a measure of the bequest, the Court will ascertain how much ought to be expended; thus, a gift of a sum of money to an executor for his trouble, or even of a house or garden to be built at the expense of his executors, is good, and the Court will fix the amount. *Jackson v. Hamilton*, 3 J. & Lat. 702; *Edwards v. Jones*, 35 B. 474. See *Magistrates of Dundee v. Morris*, 3 Macq. 134.

Gift of a sum not exceeding a certain amount.

A gift of 50*l.* or 100*l.*, or of a sum not exceeding a certain amount, will be construed in favour of the legatee as a gift of the larger sum. *Seale v. Seale*, 1 P. Wms. 290; *Thompson v. Thompson*, 1 Coll. 395; *Cope v. Wilmot*, 1 Coll. 396, *n.*; *Gough v. Bult*, 16 Sim. 45.

Gift of the rest of a fund when the rest cannot be ascertained.

Upon similar principles the gift of the rest of a fund, if the rest cannot be ascertained, is void; as in a devise of such houses as she shall select to A. and the others to B., where A. dies before the testator. *Boyce v. Boyce*, 16 Sim. 476; *Jerningham v. Herbert*, 4 Russ. 388:



In the case of a fund bequeathed upon trust to apply a portion to a purpose which is void and the surplus to charity, it seems the whole fund may be applied to charity though the amount applicable to the invalid object may not be ascertainable. <sup>Surplus to charity after void object.</sup>

For instance, if a fund is given upon trust to apply the income in repairing a tomb and to give the surplus to a charitable object, the charitable object is entitled to the whole fund. *Fisk v. A.-G.*, 4 Eq. 521; *Hunter v. Bullock*, 14 Eq. 45; *Dawson v. Small*, 18 Eq. 114; *In re Williams*, 5 Ch. D. 735; *In re Birkett*, 9 Ch. D. 576; see *Fowler v. Fowler*, 33 B. 616; *Kirkman v. Lewis*, 38 L. J. Ch. 570.

Possibly, if the invalid object is such that the whole fund might fairly be expended upon it, the whole gift will be void. *Chapman v. Brown*, 6 Ves. 404; *Cramp v. Playfoot*, 4 K. & J. 479.

The Court will, if possible, ascertain the amount necessary for each object in order to prevent the gift of the surplus from being void for uncertainty. *Mitford v. Reynolds*, 1 Ph. 185, and 16 Sim. 105; *Magistrates of Dundee v. Morris*, 3 Macq. 134; *Fisk v. A.-G.*, 4 Eq. 521.

## CHAPTER XLVII.

## SATISFACTION AND ADEMPITION.

## SATISFACTION.

Satisfaction of portions by legacies.

WHEN a parent or a person *in loco parentis* has covenanted to pay a portion to a child and afterwards gives a legacy of the same or a larger amount to that child, the legacy is *prima facie* a satisfaction of the portion and if the legacy is of smaller amount it is a satisfaction *pro tanto*. *Warren v. Warren*, 1 B. C. C. 305; 1 Cox, 41.

Declarations by the testator are admissible to rebut the presumption against double portions. *In re Tussaud's Estate*, 9 Ch. D. 363.

Satisfaction arises between a gift and a liability to give.

Satisfaction only arises between a gift and a prior liability to give and not between a sum actually settled and a subsequent gift by will or otherwise. *Samuel v. Ward*, 22 B. 347.

Satisfaction and ademption distinguished.

On the other hand, when there is a gift by will to a child, and the testator afterwards in his lifetime gives the child a sum of money, the bequest is adeemed *pro tanto*.

The difference between the two cases is, that in the former case the portion which the testator has covenanted to pay can only be satisfied by the bequest with the consent of the objects of the covenant; in the latter case the gift by will is revocable and the testator may substitute for it any form of gift he pleases.

Again, in the former case the question whether the gift by will was intended to be a satisfaction of the covenant is a question of testamentary intention; in the latter the question is as to the effect of an act subsequent to the will, and not as to any intention manifested by the will itself.

Lastly, in cases of satisfaction, election must always arise; in cases of ademption it never can.

It follows that the presumption that a gift by will is intended to be a satisfaction of a prior covenant to pay a portion is more easily rebutted than the similar presumption in the case of ademption.

Thus, the fact that the objects of the gift by will are not the same as the objects of the covenant, is a stronger argument against satisfaction than against ademption, as the testator cannot be supposed to have wished to do by his will what it was out of his power to do, though, on the other hand, the argument is inconclusive, since the bequest by will may be intended as a satisfaction with regard to some of the objects of the covenant, leaving such of them as take nothing under the will to their rights under the covenant. See *In re Tussaud's Estate*, 9 Ch. D. 363.

Thus, a covenant to settle a certain share upon a son for life and then upon trusts for the benefit of his wife and children, is satisfied as regards the son by a bequest to him absolutely. *McCarogher v. Whieldon*, 3 Eq. 286; see *Bennett v. Houldsworth*, 6 Ch. D. 671.

So, too, a direct bequest to grandchildren is, as regards the grandchildren, a satisfaction of a covenant to settle a sum upon a daughter and her husband for their lives and the life of the survivor, remainder to their children as they should appoint and in default of appointment to the children equally. *Campbell v. Campbell*, L. R. 1 Eq. 383.

Covenant  
to settle  
for life  
satisfied by  
absolute  
bequest.  
  
Covenant  
to settle in  
remainder  
satisfied by  
immediate  
bequest.

Legacies  
in lieu of  
claims  
under the  
settle-  
ment.

The fact that legacies to the testator's widow are declared to be in lieu of her claim under the settlement will not rebut the presumption against double portions in the case of legacies to children without any such declaration. *Ackworth v. Ackworth*, cited 3 Ves. 527; 1 B. C. C. 307, *n.*; *Moulson v. Moulson*, 1 B. C. C. 83; see, too, *Finch v. Finch*, 1 Ves. jun. 534, where the legacy was expressed to be for a portion.

Satisfac-  
tion re-  
butted by  
the dif-  
ference be-  
tween the  
subject-  
matter of  
the cove-  
nant and  
bequest.

The presumption of satisfaction may be rebutted by the difference in the thing given by the will and covenanted to be settled.

a. Thus a devise of land is no satisfaction of a covenant to pay money, unless the lands are expressly estimated by the testator in money. *Goodfellow v. Burchett*, 2 Vern. 298; *Bengough v. Walker*, 15 Ves. 507.

Portion  
satisfied by  
gift of  
residue.

But the fact that the gift by will is of a share of residue will not prevent the gift being a satisfaction of a portion. *Lady Thynne v. Earl of Glengall*, 2 H. L. 131.

Contingent  
legacy and  
vested por-  
tion.

b. A contingent legacy is no satisfaction of a vested portion. *Bellasis v. Uthwait*, 1 Atk. 426; *Hanbury v. Hanbury*, 2 B. C. C. 352; *Pierce v. Locke*, 3 Ir. Ch. 205, 215.

Differ-  
ences be-  
tween the  
covenant  
and the  
will insuffi-  
cient to  
rebut satis-  
faction.

The presumption of satisfaction will not be rebutted by slight differences between the covenant and the will; as, for instance, differences in the mode of payment, the covenant being to pay on the widow's death, the will within three months of her death. *Sparkes v. Cator*, 3 Ves. 530; *Copley v. Copley*, 1 P. Wms. 146; see *Bethel v. Abraham*, 22 W. R. 745.

Or by the fact that the covenant contains a provision for children dying before their portions are payable and the will does not. *Hinchcliffe v. Hinchcliffe*, 3 Ves. 516.

Or that the settlement gives a power to the husband and wife jointly, while the will gives it to the wife alone. *Thynne v. Earl of Glengall*, 2 H. L. 131; *Russell v. St.*

*Aubyn*, 2 Ch. D. 398; *Romaine v. Onslow*, 24 W. R. 899.

Or that the settlement is upon children of the daughter by a particular marriage, whereas the gift by will is to all the children. *Thynne v. Earl of Glengall*, *sup.*; *Russell v. St. Aubyn*, 2 Ch. D. 398.

A restraint upon anticipation will not rebut satisfaction, nor will the fact that the will gives a remainder to children in fee, the covenant being to them in tail. *Weall v. Rice*, 2 R. & M. 251.

Nor will the fact that the gift by will gives the wife the first life estate, whereas the covenant gives it to the husband. *Russell v. St. Aubyn*, 2 Ch. D. 398; *Romaine v. Onslow*, 24 W. R. 899.

Nor the fact that the life estate given to the husband by the will is determinable on bankruptcy or alienation, there being no such liability to determine in the covenant. *Russell v. St. Aubyn*, *sup.*

The omission from the will of a life interest to the husband, who took the second life interest under the covenant, has been held not to rebut the presumption of satisfaction. *Mayd v. Field*, 3 Ch. D. 587.

But a legacy to a daughter for life for her separate use and after her decease, in case her husband should be living, for such persons exclusive of her husband as she should appoint and in case he should die in her lifetime to her appointees, is not a satisfaction of a covenant to settle on trust to pay a part to the daughter for pin-money and the rest to the husband for life and if the daughter survive him to her for life, remainder to the children of the marriage as she shall appoint. *Lord Clivechester v. Coventry*, L. R. 2 H. L. 71; see *Lewis v. Lewis*, I. R. 11 Eq. 110, 340.

What amount of difference is sufficient to rebut satisfaction.

Nor is a legacy to a daughter for life to her separate use without power of anticipation with remainder to her

children, a satisfaction of a covenant to settle upon such trusts as the daughter should with the consent of trustees appoint, and subject thereto for the daughter and her husband successively for life, remainder for the children and in default of children for the husband absolutely. *In re Tussaud's Estate*, 9 Ch. D. 363.

Direction  
to pay  
debts.

It seems that a direction in the will to pay debts, or debts and legacies, would not alone rebut the presumption of satisfaction, though great stress has been laid upon it, and, coupled with other circumstances, it will have that effect. *Lord Chichester v. Coventry*, L. R. 2 H. L. 71; *Paget v. Grenfell*, 6 Eq. 7; *Bennett v. Houldsworth*, 6 Ch. D. 671.

Covenant  
in the  
nature of a  
debt.

Again, when the portion covenanted to be paid is in the nature of a debt due to the husband or the trustees of the settlement, the presumption of satisfaction is more easily rebutted.

Thus, in *Hall v. Hill*, 1 Dr. & War. 94, a legacy to the daughter was held to be no satisfaction of a bond to the husband on the marriage of the daughter. See, too, *Chichester v. Coventry*, *supra*.

#### SATISFACTION IN THE CASE OF STRANGERS.

Express  
declara-  
tion that  
legacies  
are to be  
in satis-  
faction.

In the case of gifts by strangers, there is no presumption against double portions and a question of satisfaction can only arise upon the express declaration of the donor, that subsequent gifts by him are to go in satisfaction of what he has given by the instrument containing the declaration.

Whether  
provision  
by will is  
an ad-  
vancement  
in the tes-  
tator's life-  
time.

In such cases the question has arisen whether a provision by will is to be considered an advancement in the lifetime of the testator.

There can be no doubt that, where there is a declaration that gifts made by a father "in his lifetime or by his will,"

or "in his life or at his death," are to go in satisfaction, provision by will would be included in these words. *Papillon v. Papillon*, 11 Sim. 642; *Rickman v. Morgan*, 1 B. C. C. 63; 2 B. C. C. 393.

But there is no such rule as that supposed to have been laid down by Lord Eldon in *Leake v. Leake*, 10 Ves. 476, p. 488, that a provision by will is to be considered as an advancement in the lifetime of the party. Whether it is or not depends on the language of the declaration.

Thus, a declaration that if the father should during his life advance or pay any sums for the benefit of his children, the sums so advanced should be taken *pro tanto* in satisfaction of the portions of his children, will not include gifts by will. *Cooper v. Cooper*, 8 Ch. 813; see *Douglas v. Willes*, 7 Ha. 318.

Though, on the other hand, the words may be large enough to include provision by will; where, for instance, the proviso is, if the father should have bestowed or given portions to his children on their marriage, "or otherwise provided for them." *Leake v. Leake*, 10 Ves. 477.

And the words "settle, give, or advance" have been held to include provision by will. *Onslow v. Michell*, 18 Ves. 490; see, too, *Golding v. Haverfield*, 13 Pr. 593; *M'Cl. 345*; *Fazakerley v. Gellibrand*, 6 Sim. 591; but the authority of these cases must be looked upon as doubtful since *Cooper v. Cooper*.

A devise of lands is not within a proviso that sums of money advanced are to be taken in satisfaction, nor is a gift to the trustees of the marriage settlement of the donee, and not the donee personally. See Lord Romilly's judgment, *Cooper v. Cooper*, 6 Ch. 820, *n*.

Where sums advanced are directed to be taken in satisfaction, unless the contrary is directed in writing by the person making the advance, the declaration to the contrary need not be express, but may be gathered from the general

Declaration that advances are to be in satisfaction, unless the con-

terms of the instrument by which the advance is made. *Leake v. Leake*, 18 Ves. 494; *Fazakerley v. Gellibrand*, 6 Sim. 591.

### SATISFACTION OF DEBTS.

The doctrine of satisfaction also applies to a legacy to a debtor. In such a case the legacy, if of equal or greater amount, is *prima facie* considered a satisfaction of the debt. *Talbot v. Shrewsbury*, Prec. Ch. 394; *Fowler v. Fowler*, 3 P. Wms. 353.

The general rule has, however, been so often disproved of, and has been held to be excluded by such slight indications of intention, that it is of small practical importance.

1. As to what debts may be satisfied by legacies:—

*a.* The debt to be satisfied must be a debt existing at the date of the will. *Cranmer's Case*, 2 Salk. 508; *Thomas v. Bennett*, 2 P. Wms. 343; *Plunkett v. Lewis*, 3 Ha. 330.

*b.* The testator must have been certain at the date of the will that a debt was due and to whom it was due, and therefore a mere liability on a current account, or on a negotiable instrument, such as a bill of exchange, will not be satisfied by a legacy. *Rawlins v. Powell*, 1 P. Wms. 297; *Carr v. Eastabrooke*, 3 Ves. 561.

But the fact that the debt is liable to decrease makes no difference. *Edmunds v. Low*, 3 K. & J. 318.

2. As to what legacies will not be considered to satisfy debts:—

*a.* A legacy of smaller amount is no satisfaction of a debt. *Cranmer's Case*, 2 Salk. 508; *Atkinson v. Webb*, 2 Vern. 478; *Eastwood v. Vinke*, 2 P. Wms. 614; *Gee v. Liddell*, 35 B. 621; see *Richardson v. Elphinstone*, 2 Ves. jun. 468.



b. Nor is a gift of residue. *Barrett v. Beckford*, 1 Ves. sen. 519. Gift of residue,

c. Nor is a gift of a contingent legacy. *Tolson v. Collins*, 4 Ves. 482; *Matthews v. Matthews*, 2 Ves. sen. 635. of a contingent legacy.

3. Satisfaction is also rebutted by the difference in the nature of the legacy and the debt.

a. As where the debt is by bond and the testator devises land. *Eastwood v. Vinke*, 2 P. Wms. 614; *Richardson v. Elphinstone*, 2 Ves. jun. 463. Debt by bond is not satisfied by a devise of land.

b. If the legacy is less advantageous than the debt; if, for instance, the legacy is payable in six months, the debt in one: *Haynes v. Mico*, 1 B. C. C. 129; *Deveze v. Pontet*, 1 Cox, 188; *Adams v. Lavender*, M'Cl. & Y. 41; or the legacy is payable half-yearly, the debt quarterly: *Atkinson v. Webb*, Prec. Ch. 236; if the debt is secured, the legacy not: *Wood v. Wood*, 7 B. 183; or the debt is a first charge, the legacy not: *Hales v. Darell*, 3 B. 325; if the debt is to the separate use, the legacy not. *Bartlett v. Gillard*, 3 Russ. 149; *Rowe v. Rowe*, 2 De G. & S. 294; *Fourdrin v. Gowdey*, 3 M. & K. 409; but see *Atkinson v. Littlewood*, 18 Eq. 595. Debt not satisfied when the legacy is less advantageous.

And an annuity given by will and therefore not payable till a year after the testator's death, is not a satisfaction of a covenant to pay an annuity by half-yearly payments. *In re Dowse*; *Dowse v. Glass*, 50 L. J. Ch. 285.

c. Sums held on trust for a tenant for life are not satisfied by legacies of those amounts to the tenants for life absolutely. *Fairer v. Park*, 3 Ch. D. 309.

d. If the legacy is expressed to be given in satisfaction of dower. *Pinchin v. Simms*, 30 B. 119; *Glover v. Hartcup*, 34 B. 74. Legacy in lieu of dower.

e. The fact that the debt is due to one set of trustees, and the legacy is given to another, is a circumstance to be considered, but apparently not alone decisive. *Pinchin* Debt due to one set of trustees, legacy to another.

v. *Simms*, 30 B. 119; *Smith v. Smith*, 3 Giff. 121; and see *Atkinson v. Littlewood*, 18 Eq. 595.

Direction to pay debts and legacies. f. The presumption will be rebutted by a direction to pay "debts and legacies." *Chancey's Case*, 1 P. Wms. 408; *Lethbridge v. Thurlow*, 15 B. 334; *Richardson v. Greese*, 3 Atk. 65; *Field v. Mostin*, 2 Dick. 543; *Jefferies v. Michell*, 20 B. 15; *Hassell v. Hawkins*, 2 Dr. 469.

But not if the direction is in the will, and a debtor whose debt is incurred subsequent to the will receives a legacy by a codicil. *Gaynon v. Wood*, 1 P. Wms. 409, n.

Whether a debt payable within three months of the testator's decease would be within the direction to pay debts seems doubtful. In *Wathen v. Smith*, 4 Mad. 325, it was held not; on the other hand, Lord Romilly, in *Cole v. Willard*, 25 B. 568, disapproved of this decision. See too, *Atkinson v. Littlewood*, 18 Eq. 595.

Direction to pay debts only. g. Whether a direction to pay "debts" only will have the effect of rebutting the presumption of satisfaction seems doubtful. There is no case deciding that it will, and there is the express decision of Lord Hatherley as V.-C., that it will not, *Edmunds v. Low*, 3 K. & J. 318. Against this must be set the dicta of Lord Romilly, in *Cole v. Willard*, 25 B. 568; *Pinchin v. Simms*, 30 B. 119; and of V.-C. Malins in *Atkinson v. Littlewood*, 18 Eq. 595. All the cases, however, show that a direction to pay debts only is a circumstance to be taken into account.

#### ADEMPMENT.

As ademption arises from acts subsequent to the will, there can be no expression of intention contained in the will as to whether a subsequent gift was meant to be an ademption or not; the question is, therefore, not properly

within the limits of the present treatise. For the sake of convenience, however, it may be useful to notice a few of the more important points arising with reference to this subject.

I. A bequest to a child or person to whom the testator has placed himself in *loco parentis* is adeemed by a subsequent gift to the legatee in the testator's lifetime, unless the nature of the two gifts is so different as to rebut the presumption. *Leighton v. Leighton*, 18 Eq. 459; see *Boyd v. Boyd*, 4 Eq. 305; *Taylor v. Taylor*, 20 Eq. 155.

Ademp-  
tion of  
legacies  
by ad-  
vances.

A gift of less amount than the legacy is an ademption *pro tanto*. *Pym v. Lockyer*, 5 M. & Cr. 29.

For the purposes of ademption the value of the advance is to be taken as at the time it was made. *Watson v. Watson*, 33 B. 576.

For the mode of valuing annuities, see *Hatfield v. Minet*, 8 Ch. D. 136.

Ademption applies as well to a gift of residue as to general legacies, though in the case of residue it will be applied only between children against a child in favour of a child, and not in favour of a stranger. *Montefiore v. Guedalla*, 1 D. F. & J. 93; *Meinertzagen v. Walters*, 7 Ch. 670.

Ademp-  
tion in the  
case of a  
residue.

Differences in the time of payment of the legacy and the portion are immaterial. *Hartopp v. Hartopp*, 17 Ves. 184; *Stevenson v. Masson*, 17 Eq. 84.

Advances, however, for some particular purpose, as to buy a wedding outfit or small occasional presents, or even a small annual allowance, will not adeem legacies by will. *Ravenscroft v. Jones*, 32 B. 669; *Watson v. Watson*, 33 B. 574; *Schofield v. Heap*, 27 B. 93; see *Hatfield v. Minet*, 8 Ch. D. 136.

Small ad-  
vances for  
a particu-  
lar purpose  
will not  
adeem a  
legacy.

As in the case of satisfaction the presumption of ademption may be repelled by the difference in the subject-matter of the two gifts.

**Legacy of money not adeemed by a gift in stock-in-trade.** Thus there will be no ademption if the legacy is money and the gift is stock-in-trade. *Holmes v. Holmes*, 1 B. C. C. 555. See *Davis v. Boucher*, 3 Y. & C. Ex. 411; *Pym v. Lockyer*, 5 M. & C. 48.

**Vested legacy and contingent advance.** Nor if the legacy is certain and the gift is contingent. *Spinks v. Robins*, 2 Atk. 493; *Crompton v. Sale*, 2 P. Wms. 553.

**A legacy is adeemed by a subsequent settlement.** A bequest of a sum of money to a child absolutely is adeemed by the subsequent settlement of that or a larger amount on the marriage of the child; if a smaller amount is settled, it is an ademption *pro tanto*. *Lord Durham v. Wharton*, 3 Cl. & F. 146; *Stevenson v. Masson*, 17 Eq. 78; *Edgeworth v. Johnston*, I. R. 11 Eq. 326.

And even if the legacy be given to the child for life with remainder to her children, a subsequent gift to her absolutely is an ademption. *Kirk v. Eddowes*, 3 Ha. 509.

**Advance to a child will not adeem a substitutional bequest to his issue.** But where there is a substitutional gift to the issue of a child dying in the testator's lifetime, a subsequent advancement to a child who dies in the testator's lifetime leaving issue will not operate as an ademption of the gift to the issue. *Rose v. Rogers*, 39 L. J. Ch. 791; *Hewitt v. Jardine*, 14 Eq. 58.

**Gift to the husband for the purposes of the marriage adeems a legacy to the daughter.** And a sum given to a daughter's husband in consideration of his making a settlement upon her, or for the purposes of the marriage, is an ademption of a legacy to the daughter. *Lord Durham v. Wharton*, 3 Cl. & F. 146; see *Nevin v. Drysdale*, 4 Eq. 517.

But a gift to the husband absolutely, though expressed to be a portion for a daughter, is not an ademption of a legacy to the daughter and her children. *Ravenscroft v. Jones*, 32 B. 669; *Cooper v. Macdonald*, 16 Eq. 258; see *McClure v. Evans*, 6 W. R. 428.

**An absolute gift may adeem a legacy.** The fact that the legacy to the child is given over in certain events will not prevent a subsequent gift to the child absolutely, or a settlement upon her marriage from

adeeming the legacy, both as regards the child and the persons interested under the gift over. *Twining v. Powell*, 2 Coll. 262; *Dawson v. Dawson*, 4 Eq. 504; *Cooper v. Macdonald*, 16 Eq. 258.

An adeemed legacy is not revived by a codicil republishing the will. *Powys v. Mansfield*, 3 M. & Cr. 376; see *Ravenscroft v. Jones*, 4 D. J. & S. 228.

An advance made before the date of the will will not operate as an ademption in the absence of a special agreement that it shall. *Upton v. Prince*, Cas. temp. Talb. 71; *In re Peacock's Estate*, 14 Eq. 236; *Taylor v. Cartwright*, 41 L. J. Ch. 529.

Where a legacy is given for a particular purpose, whether to a stranger or not, and the testator afterwards in his lifetime satisfies that purpose, the legacy is adeemed. *Debeze v. Mann*, 2 B. C. C. 519; *Monck v. Monck*, 1 Ba. & Be. 298; *Powys v. Mansfield*, 3 M. & C. 359.

But it must appear on the face of the will that the legacy is for a particular purpose. *Pankhurst v. Howell*, 6 Ch. 136.

II. In some cases the will contains directions that advances are to be deducted from the shares of legatees.

Where the testator recites that he has advanced a certain sum to a legatee and directs it to be deducted from the legacy, or directs entries in his ledger to be taken as the amounts of advances, the legatee is bound by the recital, or the entries, though the advances may be incorrectly stated. *In re Aird's Estate*; *Aird v. Quick*, 12 Ch. D. 291; *Quihampton v. Going*, 24 W. R. 917.

But entries made subsequent to the date of the will cannot be incorporated into it, and made binding on the legatee, though they are admissible as evidence that advances were made by the testator. *Smith v. Conder*, 9 Ch. D. 170; *Whateley v. Spooner*, 3 K. & J. 542.

Where advances are directed to be brought into account

evidence is not admissible to show that the testator, some time after an advance, had written off a portion of the advance as a gift. *Smith v. Conder*, 9 Ch. D. 170.

A direction to deduct advances from shares of residue does not affect a residuary legatee's right to a general legacy given him by the will. *Smith v. Crabtree*, 6 Ch. D. 591.

Sum due  
after testa-  
tor's death.

A sum not payable to the testator till after his death is not within a direction to bring advances into hotchpot. *Auster v. Powell*, 1 D. J. & S. 99.

Legatee  
bankrupt.

If the legatee has become bankrupt and the testator proved in the bankruptcy for a debt due from him, so much of the debt as remains unpaid must be brought into account. *Auster v. Powell*, 1 D. J. & S. 99; see *Silverside v. Silverside*, 25 B. 340.

Where the income of a legatee was directed to be made up to a certain amount, the legatee to certify her income from all sources, it was held that the legatee was not bound to bring into account an annuity given by a subsequent testator with a direction that it was not to be taken into account, but was to be a clear beneficial addition. *In re Hedges's Trust Estate*, 18 Eq. 419.

A direction to deduct a sum from the share of a legatee as an equivalent for an estate given to him fails if the estate is not purchased. *Nugee v. Chapman*, 29 B. 288.

Under a direction to deduct advances made to a legatee by her brothers or sisters, debts owing from the legatee to her brothers and sisters may be deducted though barred by the statute. *Poole v. Poole*, 7 Ch. 17.

Where the testator directed his sons to pay or account for debts owing to him before they should receive their shares, and the share of a son was settled by a codicil, it was held that a debt due from the son was to be brought into account for the purpose of division, but not for the

purpose of increasing the amount to be settled. *White v. Turner*, 25 B. 505.

Where the residue was given to the testator's children by a first and second wife to vest at twenty-one, with a direction that if the children by the first wife should become entitled to another fund they should bring it into hotchpot, it was held that the hotchpot clause ceased to operate when the eldest child attained twenty-one. *Stares v. Penton*, 4 Eq. 40.

Where the testator directed his children, who were his residuary legatees, to bring advances into hotchpot, and a share given to one of the children was revoked and lapsed, it was held that the hotchpot clause applied to the lapsed share, and that the son, whose share was revoked, could not claim as next of kin without bringing advances into hotchpot, but not so as to increase the widow's share. *Stewart v. Stewart*, 15 Ch. D. 539.

In the case of direct gifts where advances made by the testator are directed to be deducted from a legatee's share, interest at 4 per cent. on such advances must be computed from the testator's death. *Andrewes v. George*, 3 Sim. 393; *Hilton v. Hilton*, 14 Eq. 468; *Field v. Seward*, 5 Ch. D. 538; see *Poole v. Poole*, 7 Ch. 17.

If the testator directs the advances to be deducted with interest at 5 per cent., interest at that rate will be computed down to the testator's death and at 4 per cent. from that date. *Stewart v. Stewart*, 15 Ch. D. 539.

In the case of gifts in remainder interest must be computed from the death of the tenant for life. *In re Rees*; *Rees v. George*, 29 W. R. 301.

Under the ordinary hotchpot clause life and reversionary interests must be brought into account. *Eales v. Drake*, 1 Ch. D. 217.

In the case of appointments under powers, hotchpot clauses will not be implied.

Appoint-  
ment "as  
and for her  
share." Thus, an appointment in favour of an object "as and for her share" does not exclude that object from sharing in the unappointed part, though the sum left unappointed is such as would give all the objects equal shares. *Wilson v. Piggott*, 2 Ves. jun. 351; *Wombwell v. Hanrott*, 14 B. 143; *Walmsley v. Vaughan*, 1 De G. & J. 114.

Share in  
lieu of  
claims.

And it seems a direction that the appointed share is in lieu of all claims and demands of the donee to or for her original share in the trust fund will not exclude him from the unappointed part. *Foster v. Cautley*, 6 D. M. & G. 55.

On the other hand, an appointment to one object, coupled with a declaration that the donee of the power wishes the fund equally divided, may amount to an appointment of the rest of the fund to the other objects. *Fortescue v. Gregor*, 5 Ves. 553.

And a direction for accruer which can only have a meaning on the supposition that the fund has been appointed in favour of other objects, may also amount to an appointment. *Foster v. Cautley*, 6 D. M. & G. 55.

In the case of a deed, if the appointee is a party and a share is appointed to him in lieu of his share in the fund, the appointee cannot share in the unappointed part. *Clune v. Apjohn*, 17 Ir. Ch. 25; *Armstrong v. Lynn*, I. R. 9 Eq. 186.

Under a gift to several persons as A. shall appoint with a gift in default of appointment to them equally, a direction to bring advances into hotchpot applies only to the unappointed portion of the fund. *Brocklehurst v. Flint*, 16 B. 100.



## CHAPTER XLVIII.

## INTERESTS UNDISPOSED OF.

## LAPSE.

PORTIONS of a testator's property may be undisposed, either because the disposition attempted by him has failed, or because no disposition has been attempted.

A devise or legacy, whether it be of a debt due to the testator or not, lapses by the death of the devisee or legatee before the testator, or even before the date of the will. *Doctrines of lapse.* *Elliott v. Davenport*, 1 P. Wms. 83; 2 Vern. 581; *Maybank v. Brooks*, 1 B. C. C. 84.

Confirmation by codicil of a will containing a legacy to a legatee, her executors and administrators, where the legatee has died since the date of the will, does not prevent a lapse or give the legacy to the executors of the legatee. *Confirmation by codicil.* *Hutcheson v. Hammond*, 3 B. C. C. 127; *Maybank v. Brooks*, 1 B. C. C. 83.

Where the gift is to several named persons as tenants in common, the shares of any who die before the testator lapse. *Gift to tenants in common by name.* *Page v. Page*, 2 P. Wms. 489; *Peat v. Chapman*, 1 Ves. sen. 542.

Possibly, if one of the named persons is shown on the face of the will to be dead at the date of the will, the fund would be divisible among the others. *Person dead at date of will.* *Clarke v. Clemmans*, 36 L. J. Ch. 171.

So a devise by A. to the uses of B.'s will can only take

effect in favour of those who survive A. *Culsha v. Cheese*, 7 Ha. 245.

The doctrine of lapse applies to a power of appointment exercised by will, and the appointee must survive the donee of the power in order to take. *Duke of Marlborough v. Lord Godolphin*, 2 Ves. sen. 61; *Freeland v. Pearson*, L. R. 3 Eq. 658; *In re Susanni's Trusts*, 47 L. J. Ch. 65.

An appointment by will in accordance with a covenant is subject to the ordinary rule as to lapse. *Re Brookman's Trust*, 5 Ch. 182; see *Jervis v. Wolferstan*, 18 Eq. 18.

Appoint-  
ment in  
excess of  
fund.

If a testator appoints under a power sums exceeding the amount of the fund and one of the appointees predeceases him the other appointees are entitled to the benefit of the lapse. *Eales v. Drake*, 1 Ch. D. 217.

Gift to  
debtor.

A gift to a debtor of his debt, though the debt be given to him, his executors and administrators, with a direction to hand over the securities to him, is in effect a legacy, and lapses by the death of the debtor in the testator's lifetime. It is immaterial whether the debt is given or forgiven. *Toplis v. Baker*, 2 Cox, 118; *Elliott v. Davenport*, 1 P. Wms. 83; 2 Vern. 521; *Maitland v. Adair*, 3 Ves. 231; *Izon v. Butler*, 2 Pr. 34.

Possibly, a general direction to hand over the security to be cancelled might release the debt, whether the debtor survives the testator or not. *Sibthorp v. Mozom*, 3 Atk. 580; 1 Ves. sen. 49; see *South v. Williams*, 12 Sim. 566.

Legacies  
to creditors  
whose  
debts are  
barred.

With regard to legacies to creditors of the testator in discharge of debts which have been released by the operation of the bankruptcy laws or by lapse of time:—

1. A gift to the official assignee in bankruptcy in trust to pay debts will not fail as regards creditors who die in the testator's lifetime, though the debts are barred by the Statute of Limitations as well as discharged by a certificate in bankruptcy. *In re Sowerby's Trusts*, 2 K. & J

630; 7 D. M. & G. 429; *Turner v. Martin*, 5 W. R. 277; 3 Jur. N. S. 397.

2. Nor will the gift of a sum to be divided among creditors, though the debts may be barred by the Statute of Limitations, if they have not been released by the creditors. *Williamson v. Naylor*, 3 Y. & C. Ex. 208; *Phillips v. Phillips*, 3 Ha. 281.

3. On the other hand, if the gift is not through the medium of the assignee and the debts have been released or extinguished, the gift is mere bounty, and will fail as regards the creditors dying in the testator's lifetime: *Coppin v. Coppin*, 2 P. Wms. 295; but the authority of this case is very doubtful. And see *Golds v. Greenfield*, 2 Sm. & G. 476.

A declaration that a legacy shall not lapse is not sufficient to prevent lapse, unless it is clear that it is to go to the estate of the legatee in the event of his death. *Pickering v. Stamford*, 3 Ves. 493; *Johnson v. Johnson*, 4 B. 318; *Underwood v. Wing*, 4 D. M. & G. 633; see *Wilder's Trusts*, 27 B. 418.

But a gift to A. and his executors or administrators with a direction that the legacy is not to lapse has been held sufficient. *Sibley v. Cook*, 2 Atk. 572.

On the other hand, in the case of a gift in similar terms, a direction that the legacy was to vest from the date of the will was held insufficient to prevent lapse. *Browne v. Hope*, 14 Eq. 343.

The interest of persons taking in default of appointment does not fail by the death of the donee of the power before the testator. *Hardwick v. Thruston*, 4 Russ. 380; *Edwards v. Saloway*, 2 Ph. 625; *Nicholls v. Haviland*, 1 K. & J. 504; *Kellett v. Kellett*, 1 R. 5 Eq. 298.

Nor do the interests of those taking in remainder, though they may be the next of kin of the tenant for life, unless the subsequent limitations are only a settle-

Effect of a declaration against lapse.

Interests of persons to take in default of appointment.

Interests of persons in remainder not affected by

lapse of  
the life  
interest.

ment of the shares to which the legatees actually become entitled. Cases *supra*, and *Meyer v. Townshend*, 3 B. 443; *In re Speakman*; *Unsworth v. Speakman*, 4 Ch. D. 620; *Stewart v. Jones*, 3 De G. & J. 532; perhaps *Baker v. Hanbury*, 3 Russ. 340.

Whether a  
gift to A.  
or his  
executors  
will lapse.

It is clear that a gift to A. or his executors for the benefit of his estate after a life interest, or where the payment is postponed, will fail by the death of A. before the testator: *Bone v. Cook*, McClel. 168; 13 Pr. 332; *Corbyn v. French*, 4 Ves. 418; *Tidwell v. Ariel*, 3 Mad. 403, where heirs was read as executors and administrators. *Leach v. Leach*, 35 B. 185.

This rule, however, does not apply where the gift is to A. or his heirs after a life interest, where heirs means next of kin, who take beneficially and not as mere representatives. *In re Porter's Trusts*, 4 K. & J. 188.

But it would seem a direct gift to A. or his executors, if executors is construed in its literal sense, would not lapse by A.'s death before the testator. See *Maxwell v. Maxwell*, I. R. 2 Eq. 478; see, however, *Aspinall v. Duckworth*, 35 B. 307; and *ante*, pp. 286, 287.

Charges  
will not  
fail by the  
death of  
the devisee  
subject to  
the charge.

If there is a gift to A. charged with a sum payable to B., the legacy to B. does not lapse by the death of A. before the testator. *Wigg v. Wigg*, 1 Atk. 382; *Hills v. Wirley*, 2 Atk. 605; *Oke v. Heath*, 1 Ves. sen. 134.

But the legacy would fail if the gift to A. is adeemed or revoked. *Cowper v. Mantell*, 22 B. 223.

Effect of  
sections 32  
and 33 of  
the Wills  
Act on the  
doctrine of  
lapse.

Now, by section 32 of the Wills Act, a devise of an estate tail will not lapse if there are at the death of the testator any issue inheritable under the entail.

And, by section 33, a gift of real or personal property to a child, or other issue of the testator, will not lapse if any issue of the devisee or legatee survive the testator.

The section applies to a gift to a child dead at the date of the will. *Wisden v. Wisden*, 2 Sm. & G. 396.

The issue surviving the testator need not be living at the death of the devisee or legatee. *In bonis Parker*, 1 Sw. & Tr. 523.

In such a case the property bequeathed belongs to the legatee as if he had survived the testator, and passes by his will. *Johnson v. Johnson*, 3 Ha. 157; *In bonis Parker*, 1 Sw. & Tr. 523; *Re Mason's Will*, 34 B. 494.

Property preserved from lapse by this section is not within a covenant to settle property coming to the legatee during coverture. *Pearce v. Graham*, 11 W. R. 415; 32 L. J. Ch. 359. Covenant to settle.

Section 33 applies to gifts under general powers of appointment, though there is a gift over in default of appointment. *Eccles v. Cheyne*, 2 K. & J. 676.

It does not apply to special powers, nor to cases where before the Act there would have been no lapse, as, for instance, gifts to a class. *Griffiths v. Gale*, 12 Sim. 354; *Freeland v. Pearson*, L. R. 3 Eq. 658; *Olney v. Bates*, 3 Dr. 319; *Browne v. Hammond*, Johns. 210.

These sections apply to the interest of a person dying before the date of the will, but after the Act came into operation, but not to a person dying before the Act came into operation. *Winter v. Winter*, 5 Ha. 306; *Mower v. Orr*, 7 Ha. 473; *Wild v. Reynolds*, 5 Notes of Cases, 1.

In the case of gifts to a class as tenants in common, the shares of members of the class dying before the testator do not lapse but go to the other members of the class. Doctrine of lapse in the case of gifts to a class.

A direction to settle the share to which any member of a class shall become entitled will not have the effect of preventing the shares of members dying before the testator from going to the other members. *Stewart v. Jones*, 3 De G. & J. 532. Direction to settle.

But if the direction be simply to settle the share of any member the share will be saved from lapse. *In re Speakman*; *Unsworth v. Speakman*, 4 Ch. D. 620.

In the same way a gift to the children of A. as tenants in common, to be vested at twenty-one, is in effect a gift to the children who attain twenty-one. *Re Colley's Trusts*, L. R. 1 Eq. 496.

A direction that the shares of any members of the class who die before the testator, leaving issue, shall not lapse, will not have the effect of causing the shares of those who die before the testator without issue to lapse. *Aspinall v. Duckworth*, 35 B. 307.

Gift to a class incapable of increase.

It is immaterial that the class may be so determined as to be incapable of increase; as, for instance, if the class is "my nephew and nieces living at the time of my husband's decease," as tenants in common. *Dimond v. Bostock*, 10 Ch. 358; *Lee v. Pain*, 4 Ha. 201, 250; *Leigh v. Leigh*, 17 B. 605.

No person incapable at the testator's death of taking is a member of the class.

And no person incapacitated from taking at the death of the testator is looked upon as a member of the class, so that, for instance, the share of a member of the class incapacitated from taking because he witnessed the will, goes to the other members. *Young v. Davies*, 2 Dr. & Sm. 167; *Fell v. Biddulph*, L. R. 10 C. P. 701; *In re Coleman and Jarrom*, 4 Ch. D. 165.

Appointment to object not capable of taking.

This doctrine does not apply to cases where property is appointed under a power to objects and non-objects. In such cases the objects of the power only take the shares they would have taken if the whole appointment had been valid and the rest goes as in default. *Harvey v. Stracey*, 1 Dr. 137; *In re Farncombe's Trusts*, 9 Ch. D. 652.

Revocation of the share of a member of the class.

When there is a gift to a class the revocation of the gift to one of the members of the class does not cause a lapse, but the whole goes to the other members of the class. *Shaw v. MacMahon*, 4 D. & War. 431.

And a gift of residue to several persons and to A. if living, does not lapse as to A.'s share if he is dead. *Re Hornby*, 7 W. R. 729; see *Sanders v. Ashford*, 28 B. 609.

A gift of aliquot shares to several named persons as tenants in common is not a gift to a class, and the shares of any dying before the testator lapse. *Cresswell v. Cheslyn*, 2 Ed. 123; *Ramsay v. Shelmerdine*, L. R. 1 Eq. 129.

Gift of aliquot shares to named persons.

Nor is a gift to a class of persons "before mentioned," the persons having been previously named, a gift to a class. *Re Gibson*, 2 J. & H. 656.

A gift to "the five daughters" of A., or to "my nine children," is not a gift to a class. *In re Smith's Trusts*, 9 Ch. D. 117; *In re Stansfield*, 15 Ch. D. 84.

A gift to "my executors herein-named" has been held a gift to a class, the gift being attached to the office and therefore passing wholly to those who survive to perform the office. *Knight v. Gould*, 2 M. & K. 295.

Whether a gift to named executors is subject to lapse.

But this is not the case if the gift, though the donees happen to be executors, is not given to them in respect of their office. *Barber v. Barber*, 3 M. & Cr. 688; *Hoare v. Osborne*, 12 W. R. 397.

The result is the same if the gift is to a class the members of which are then named. *Bain v. Lescher*, 11 Sim. 397.

And a gift to my wife's brother and sister and my brothers and sister equally, when the testator had at the date of the will three brothers and one sister, was held a *designatio personarum*, and the shares of two brothers who died before the testator lapsed. *Haverghal v. Harrison*, 7 B. 49.

It is clear that a gift to A., and the children of B., may in effect be a gift to a class, if the testator treats the legatees as a class. *Re Stanhope's Trust*, 27 B. 201.

Gift to a class and a named individual.

And a direction to include an individual in the class does not make it the less a class, as in a gift equally to all my children, including W. *Shaw v. MacMahon*, 4 Dr. & War. 431.

On the other hand, a gift to surviving children and W., not a gift to a class, and the share of W. will lapse by his death before the testator. *Drakeford v. Drakeford*, 33 B. 43; *Re Chaplin's Will*, 12 W. R. 147; *Aspinall v. Duckworth*, 35 B. 307; *In re Atter*; *Wilson v. Atter*, 44 L. T. N. S. 240. See *Clark v. Phillips*, 17 Jur. 886.

### RESULTING TRUSTS.

Devise  
subject to  
a charge  
which fails.

When an estate is devised subject to a charge, and the purpose for which the charge is created fails, the charge sinks for the benefit of the devisee. *A.-G. v. Milner*, 3 Atk. 112; *Jackson v. Hurlock*, Amb. 487; 2 Ed. 263; *King v. Denison*, 1 V. & B. 261; *Tucker v. Kayess*, 4 K. & J. 339; *Heptinstall v. Gott*, 2 J. & H. 449.

Where the devise is clearly subject to a charge it makes no difference that the money to be raised by the charge is given to purposes such as a charity, which, if valid, would in all events give it away from the devisee. *Baker v. Hall*, 12 Ves. 497; *Cooke v. Stationers' Company*, 3 M. & K. 262.

Whether  
the devisee  
takes sub-  
ject to a  
charge, or  
only what  
remains  
after satis-  
fying the  
charge.  
Direction  
to pay a  
certain  
sum.  
Direction  
to raise a

But where there is no express charge it must depend upon the general intention whether the particular gift is a charge, or whether the devisee was intended to take only what remains after deducting the particular gift.

1. Thus if the lands are not expressly charged, but the devisee is directed to pay a certain sum, there has been held to be a resulting trust. *Arnold v. Chapman*, 1 Ves. Sen. 108; *Bland v. Wilkins*, cit. 1 B. C. C. 61.

2. If a sum is directed to be raised, and a full disposition is made of it, for instance to a charity, in such



a way that the disposition, if valid, must in all events give the money away from the devisee of the land, who is to take only from and after the raising the money, there is a resulting trust for the heir upon failure of the particular disposition. *Tregonwell v. Sydenham*, 3 Dow. 194.

sum which  
is disposed  
of in all  
events.

But, if the money to be raised is given for purposes which, though valid, may not take effect, the mere fact that the land is not given till after raising the money will not take the money from the devisee if those purposes fail. *In re Cooper's Trusts*, 23 L. J. Ch. 25; 4 D. M. & G. 757.

And where land was devised for life and in tail after the expiration or other sooner determination of a term of ninety-nine years limited to trustees, of which no trusts were declared, actual enjoyment by the devisee being intended, the devisees were held to be subject to the term. *Sidney v. Shelley*, 19 Ves. 352.

Where a testator has by a previous instrument a power to charge real estates and exercises the power by will, the above rules have no application. In such a case, if the disposition made by the will fails, the charge is nevertheless raisable. *Simmons v. Pitt*, 8 Ch. 978.

Distinction  
between a  
charge  
created by  
the will  
and by a  
prior in-  
strument.

Upon the same principle, where there is a devise *subject* to trusts, the devisee takes the whole if those trusts fail, whereas a devise *upon* trusts which fail is undisposed of. *Clarke v. Hilton*, L. R. 2 Eq. 810; *Fenton v. Hawkins*, 9 W. R. 300; *Briggs v. Penny*, 3 Mac. & G. 546.

Devise  
subject to  
and upon  
trusts.

## ACCELERATION.

In the case of a devise to a person for life with remainder in fee, where the tenant for life is incapable of taking or is not in *rerum naturâ*, the remainder is valid and will be accelerated. Yearbook, 9 Henry VI. fo. 24 b.; Perkins, sec. 566, 567.

Accelera-  
tion.

The same rule applies in the case of personalty. *Jull v. Jacobs*, 3 Ch. D. 703.

Revocation  
or forfei-  
ture.

The rule applies if the life estate is revoked by the testator or determined by a forfeiture clause. *Lainson v. Lainson*, 18 B. 1; 5 D. M. & G. 754; *Evestaff v. Austin*, 19 B. 591; *Craven v. Brady*, 4 Eq. 209; 4 Ch. 296; *In re Love*; *Green v. Tribe*, 47 L. J. Ch. 783.

Powers of  
sale and  
powers of  
charging.  
Whether  
there is  
any dis-  
tinction  
as regards  
accelera-  
tion  
between  
appoint-  
ments and  
devises.

In the same way, powers of sale will be accelerated, but not powers to charge. *Truell v. Tysson*, 21 B. 437.

There is no distinction as regards acceleration between appointments and devises: *Craven v. Brady*, *supra*; though if the object of an appointment which is void is to benefit the persons who would take in default of appointment, and a remainder is well appointed, the remainder will not be accelerated. *Crozier v. Crozier*, 3 D. & War. 353.

Where a remainder is limited after a contingent interest, there is an intestacy until it is ascertained whether the contingent interest will take effect or not. *Wade Gery v. Handley*, 1 Ch. D. 653; 3 Ch. D. 374; *Andrew v. Andrew*, 1 Ch. D. 410; see *Carrick v. Errington*, 2 P. Wms. 361; *D'Eyncourt v. Gregory*, 84 B. 36.

#### WHO ARE ENTITLED TO INTERESTS UNDISPOSED OF.

Interests undisposed of in realty and personalty pass to the heir-at-law or next of kin, as the case may be.

Heir or  
next of kin  
excluded.

Directions excluding the heir-at-law or next of kin from any share in the testator's property will, as a general rule, be taken to have been inserted only for the purpose of the dispositions made by the will and will not exclude the heir-at-law or next of kin from taking property undisposed of. The cases on this subject are, however, not easy to reconcile.

Thus, where the testatrix directed her real and personal estate to be sold and declared that no part of the fund should in any event lapse for the benefit of the heir-at-law and showed an intention of disposing of the property by a codicil, the heir was held entitled to the proceeds of sale of real estate not disposed of. *Fitch v. Weber*, 6 Ha. 145.

According to the older cases, a gift to the testator's widow, in lieu of all claims upon his estate or in lieu of thirds, does not deprive her of a share in property undisposed of. <sup>Gift in lieu of thirds.</sup>

This has been so held where a complete disposition was attempted to be made by the testator. *Pickering v. Lord Stamford*, 2 Ves. jun. 272, 581; 3 Ves. 332, 492. <sup>Complete disposition attempted.</sup>

And the same rule has been applied in cases where there was on the face of the will an intestacy. *Johnson v. Johnson*, 4 B. 318; *Tavernor v. Grindley*, 32 L. T. N. S. 424. <sup>Intestacy on face of will.</sup>

Possibly, if the words of exclusion are large and comprehensive and there is an intestacy on the face of the will, a gift in lieu of all claims and demands would exclude the widow from a share in property undisposed of. *Lett v. Randall*, 3 Sm. & G. 83.

Upon similar principles, a direction that one of the next of kin shall take no share in the testator's property will not prevent him from taking his share under the Statutes of Distribution. *Johnson v. Johnson*, 4 B. 318; *Sykes v. Sykes*, 4 Eq. 200; 3 Ch. 301; see *Ramsay v. Shelmardine*, 1 Eq. 129; *Gould v. Gould*, 32 B. 391. <sup>Next of kin excluded.</sup>

A limitation to the next of kin of a married woman, as if she had died unmarried, will not exclude the husband's title as administrator if there are no next of kin. *Hawkins v. Hawkins*, 7 Sim. 173.

On the other hand, a gift to a child of "ten shillings and no more," has been held to bar the child's right as next of kin where no disposition was attempted to be made <sup>Gift to child of certain property</sup>

and no  
more.

by the will. *Breton v. Vachell*, 5 B. P. C. 51; 11 Vin. Ab. 185.

And a clause excluding some of the next of kin may be so framed as in effect to amount to a gift to the others. *Bund v. Green*, 12 Ch. D. 819.

Escheat.

If the testator dies without an heir, lands undisposed of by him in which he has the legal estate pass by escheat to the lord of whom they are held, if he can be ascertained, or if not to the Crown. *Viscount Downe v. Morris*, 3 Ha. 394; *Rogers v. Maule*, 1 Y. & C. C. 4; *Thruxtton v. A.-G.*, 1 Vern. 340; Co. Lit. 18, b.; *May v. Street*, Cro. Eliz. 120.

Equitable  
estates on  
failure of  
heirs.

If the estate of the testator is equitable, the person in whom the legal estate is vested, whether as trustee or mortgagee, is entitled to the lands. *Burgess v. Wheate*, 1 Ed. 177; *A.-G. v. Sands*, 2 Freem. 129; *Hardres*, 488; *Beale v. Symonds*, 16 B. 406.

The trustee  
takes when  
there is no  
heir.

The trustee is beneficially entitled, though the land may be devised on trust for sale. *Walker v. Denne*, 2 Ves. jun. 170; *Taylor v. Haygarth*, 14 Sim. 8; *Cox v. Parker*, 22 B. 168.

Where lands held by trustees for the testator are devised to other trustees, the latter are entitled upon failure of the trusts if there is no heir of the testator. *Onslow v. Wallis*, 1 Mac. & G. 506.

The Crown  
takes in  
default of  
next of  
kin.

In the case of chattels real and personal the Crown and not the trustee is entitled on failure of next of kin. *Cradock v. Owen*, 2 Sm. & G. 241; *Powell v. Merritt*, 1 ib. 381; *Read v. Stedman*, 26 B. 495; *Johnstone v. Hamilton*, 11 Jur. N. S. 777.

Estates  
*pur autre*  
*vie*.

Estates *pur autre vie* descend either to the heir-at-law or executor, according to the limitations contained in the latest instrument affecting the estate. *Croker v. Brady*, 4 L. R. Ir. 653.

Under section 6 of the Wills Act, estates *pur autre vie*, of a freehold nature, given to a man and his heirs, pass, if

undisposed of, to the heir subject to debts. If there is no heir they pass to the executor as part of the personal estate, whether the interest is legal or equitable. *Plunket v. Reilly*, 2 Ir. Ch. 585; *Reynolds v. Wright*, 25 B. 100; 2 D. F. & J. 590.

If there is no special occupant, the executor is entitled.

An estate *pur autre vie* limited to A. and his heirs and devised by A. to trustees their executors and administrators, on trust for B., passes on B.'s death intestate to his executor. *Croker v. Brady*, 4 L. R. Ir. 653.

## RESIDUE UNDISPOSED OF.

Since Lord St. Leonards' Act, 11 Geo. 4 and 1 W. 4, Effect of Lord St. Leonards' Act. c. 40, which controls the wills of testators dying after Sept. 1, 1830, the executors take the residue undisposed of for the benefit of the next of kin, unless a contrary intention is expressed in the will, parol evidence not being admissible. *Juler v. Juler*, 29 B. 34; *Love v. Gaze*, 8 B. 472.

Such contrary intention does not sufficiently appear by the mere fact that the testator shows that he conceived himself to have disposed of the residue. *Travers v. Travers*, Contrary intention within the Act. 14 Eq. 275.

But if the testator appoints three of his children executors without expressly giving them any beneficial interest and gives reasons why he has not provided by his will for his other children, the executors will take the residue beneficially. *Harrison v. Harrison*, 2 H. & M. 237.

The Act applies only where the executor would otherwise have taken the undisposed residue; it does not therefore apply where there is an express devise of the residue, whether on trusts which do not exhaust the whole or otherwise. *Saltmarsh v. Burrett*, 29 B. 474; 3 D. F. & J. The Act only applies where the will contains no gift of the residue.

279; *Neo v. Neo*, L. R. 6 P. C. 381; *Williams v. Arkle*, L. R. 7 H. L. 606.

Where there are no next of kin the Act does not apply.

If, however, there are no next of kin, Lord St. Leonards' Act does not apply and the executors will take the undisposed residue, unless a contrary intention is indicated, in which case it will go to the Crown. *Middleton v. Spicer*, 1 B. C. C. 201; *Johnstone v. Hamilton*, 11 Jur. N.S. 777; *Taylor v. Haygarth*, 14 Sim. 8; *In re Knowles*; *Roose v. Chalk*, 28 W. R. 975.

The title of executors in cases under the old law.

It becomes, therefore, necessary to consider in what cases executors would have been held excluded from the residue undisposed of under the old law.

1. They take only such residue as the testator did not intend to dispose of.

They do not take lapsed or void legacies. Nor residue given on trust.

a. They do not take legacies which have lapsed or are void. *Bennett v. Batchelor*, 3 B. C. C. 28; *A.-G. v. Tomkins*, Ambl. 216.

b. Nor do they take where the whole is expressly given to them on trusts which are void: *Dacre v. Patrickson*, 1 Dr. & Sm. 182; *Johnston v. Hamilton*, 11 Jur. N. S. 777; or not exhaustive: *Dawson v. Clark*, 18 Ves. 247; *Mapp v. Elcock*, 2 Ph. 793; 3 H. L. 492; or not declared. *Milnes v. Slater*, 8 Ves. 295; *Taylor v. Haygarth*, 14 Sim. 8; *Cradock v. Owen*, 2 Sm. & G. 241; *Read v. Steadman*, 26 B. 495; *Vezey v. Jamson*, 1 S. & St. 69; *Chester v. Chester*, 12 Eq. 444.

The fact, however, that the executors are made trustees for some particular and limited purpose does not affect their title to the residue. *Batteley v. Windle*, 2 B. C. C. 31; *Griffiths v. Hamilton*, 12 Ves. 299; *Pratt v. Sladden*, 14 Ves. 193.

Executors not entitled to the residue when they are treated as trustees.

2. And even when the property is not given to the executors upon trust, if they are appointed to carry out the will, or are treated as undertaking a duty and not receiving a benefit, they take as trustees. *Androvin v.*

*Poilblanc*, 3 Atk. 299; *Braddon v. Farrand*, 4 Russ. 87; *Giraud v. Hanbury*, 3 Mer. 150; *Lord North v. Purdon*, 2 Ves. sen. 495.

But where the trust is only inferential, evidence in favour of the executors will be admitted. *Gladding v. Yapp*, 5 Mad. 56.

3. And a presumption against the executor's title is raised if the testator shows an intention to dispose of the residue, though he may not actually do so: *Bishop of Cloyne v. Young*, 2 Ves. sen. 91; *North v. Purdon*, 2 Ves. sen. 495; *Davers v. Dewes*, 3 P. Wms. 40; *Mordaunt v. Hussey*, 4 Ves. 117; *Mence v. Mence*, 18 Ves. 348; or if he expresses an intention to dispose of part only of his property by his will: *Urquhart v. King*, 7 Ves. 225; or if the property is directed to go according to law. *Cranley v. Hale*, 14 Ves. 307.

In such cases evidence in support of the executor's title is admissible. *Bishop of Cloyne v. Young*, 2 Ves. sen. 91; *Nourse v. Finch*, 1 Ves. jun. 344; 2 Ves. jun. 78.

4. The executor takes as trustee for the next of kin :

a. If there is a legacy to a sole executor, whether general or specific, or whether in possession or reversion, or whether expressed to be for his trouble or not, or whether for life or not, if there is no gift of the remainder. *Nourse v. Finch*, 1 Ves. jun. 343; 2 Ves. jun. 78; *Southcot v. Watson*, 3 Atk. 226; *Seley v. Wood*, 10 Ves. 71; *Oldman v. Slater*, 3 Sim. 84; *Rachfield v. Careless*, 2 P. Wms. 156; *King v. Denison*, 1 V. & B. 260; *Zouch v. Lambert*, 4 Bro. C. C. 326; *Dick v. Lambert*, 4 Ves. 725.

A legacy to a sole executor converts him into a trustee.

It makes no difference that the executrix is the testator's wife or relation or that legacies are given to the next of kin. *Randall v. Bookey*, 2 Vern. 425; *Dick v. Lambert*, 4 Ves. 725; *Farrington v. Knightley*, 1 P. Wms. 543; and see note, *ib.*

If the legacy is given in general words parol evidence is admissible in support of the executor's title. *Clennell v. Lewthwaite*, 2 Ves. jun. 465, 644; *Langham v. Sanford*, 17 Ves. 435.

But not if it is given to him expressly for his trouble. *Rachfield v. Careless*, 2 P. Wms. 158.

What legacies will not convert an executor into a trustee.

It seems doubtful whether a contingent reversionary interest would raise a presumption against the executor's title. *Lynn v. Beaver*, T. & R. 63.

A legacy to an executor's wife will not convert him into a trustee for the next of kin. *Wilson v. Ivat*, 2 Ves. sen. 166; *Fruer v. Bouquet*, 21 B. 33.

In these cases the presumption against the executor's title arises from the difficulty of supposing that the testator would have given him something if he meant him to have all. Therefore, if the express legacy can be accounted for on other grounds, no presumption arises. If, for instance, the legacy is an exception out of a larger gift: *Griffith v. Rogers*, 1 Eq. Ab. 245, pl. 8; *Jones v. Westcomb*, Prec. Ch. 316; and this includes the case of a gift to the executor for life, if there is a gift of the remainder: *Granville v. Beaufort*, 1 P. Wms. 114; or if the legacy is to an executrix, a married woman, for her separate use. *Newstead v. Johnson*, 2 Atk. 45; 9 Mod. 242.

Equal legacies to several executors.

b. Equal legacies to several executors will also raise a presumption against their title to the residue. *Ommaney v. Butcher*, T. & R. 260.

And this presumption, it seems, is not rebutted by the fact that unequal bounty is shown them as regards real estate. *Mackleston v. Brown*, 6 Ves. 52, p. 64.

Legacies to some executors and not to others.

But legacies to some executors and not to others, or unequal legacies to all, raise no presumption against them, since the intention may be to favour some more than others. *Griffiths v. Hamilton*, 12 Ves. 299; *Pratt v. Sladden*, 14 Ves. 193; *Bowker v. Hunter*, 1 B. C. C. 328;



*Rawlings v. Jennings*, 13 Ves. 39; *Dawson v. Thorne*, 3 Russ. 235; *In re Knowles*; *Roose v. Chalk*, 28 W. R. 975.

If, however, a legacy be given to one of several executors expressly for his trouble they all take as trustees. *White v. Evans*, 4 Ves. 21; *Milnes v. Slater*, 8 Ves. 295.

Legacy to one of several executors for his trouble.

But in such a case parol evidence to support their title would be admitted. *Williams v. Jones*, 10 Ves. 77.

5. If it is clear that the executors are appointed not from personal motives, but merely from convenience or because they occupy a particular position, they take as trustees. *Urquhart v. King*, 7 Ves. 224; *De Mazay v. Pybus*, 4 Ves. 644; *Sadler v. Turner*, 8 Ves. 616.

Executors appointed for particular reasons.

Evidence in favour of next of kin is not admissible, except to rebut evidence in favour of the executors. *White v. Williams*, 3 V. & B. 72.

## CHAPTER XLIX.

## ADMINISTRATION.

## THE ORDER OF ASSETS.

THE order in which the assets of a testator are applied in administration is as follows:—

I. General  
personal  
estate.

I. The general personal estate. *Manning v. Spooner*, 3 Ves. 117.

1. And as to this, if a specific fund of personalty is charged, it is primarily liable if the residue is disposed of. *Browne v. Groombridge*, 4 Mad. 495; *Choat v. Yeates*, 1 J. & W. 102; *Evans v. Evans*, 17 Sim. 106; *Phillipps v. Eastwood*, 1 Ll. & G. 294; *Webb v. De Beauvoisin*, 31 B. 573; *Vernon v. Earl Mannors*, *ib.* 623.

Residue  
undisposed  
of.

2. If, however, the residue is undisposed of, the latter is primarily liable. *Holford v. Wood*, 4 Ves. 78; *Hewett v. Snare*, 1 De G. & S. 333; *Newbegin v. Bell*, 23 B. 386; *Corbet v. Corbet*, 1 R. 8 Eq. 407.

3. And generally it would seem that where there is no residuary gift, but there is in fact a residue of which no disposition has been attempted, this is in all cases the primary fund for payment of debts. *Howse v. Chapman*, 4 Ves. 542; *Taylor v. Mogg*, 27 L. J. Ch. 816.

Legacy  
given in  
lieu of a  
share of  
residue is  
payable

Legacies, however, even if given in lieu of a share of residue, the gift of which is revoked, and thereby becomes undisposed of, are not payable out of the share undisposed of, but out of the general estate. *Sykes v. Sykes*,

4 Eq. 200 ; 3 Ch. 301 ; see *Cresswell v. Cheslyn*, 2 Ed. 123 ; out of the  
 3 B. P. C. 246 ; see 1 Sw. 571, *n*. general  
personal  
estate.

But the testator may direct it to be paid out of the  
 revoked share of residue. *In re Wood's Will*, 29 B. 236 ;  
*Walsh v. Walsh*, 1 R. 4 Eq. 396.

A specific legacy falling into the residue by reason of Specific  
legacy  
lapsed.  
 lapse bears its rateable proportion with the other residue. *Scott v. Forristall*, 10 W. R. 37 ; *Morley v. Tunstall*, 7 Eq.  
 416, *n*.

5. On the question whether a lapsed share of residue Whether a  
lapsed  
share of  
residue is  
applicable  
before a  
share well  
disposed of.  
 is applicable in payment of debts in priority to a share  
 effectually disposed of:—

*a*. It is settled that if there is a general charge of  
 debts, a lapsed share only contributes rateably. *Eyre v.*  
*Marsden*, 4 M. & Cr. 231 ; *Burt v. Sturt*, 10 Ha. 415 ;  
*Oddie v. Brown*, 4 De G. & J. 179 ; see *Elborne v. Goode*,  
 14 Sim. 165 ; *Ralph v. Carrick*, 5 Ch. D. 984.

*b*. It may now be taken to be settled that the same rule No charge  
of debts.  
 applies where there is no charge of debts. *Trethewy v.*  
*Helyar*, 4 Ch. D. 53 ; *Fenton v. Wills*, 7 Ch. D. 33 ; *Blann*  
*v. Bell*, 7 Ch. D. 382 ; overruling so far as *contra Gowan v.*  
*Broughton*, 19 Eq. 77 ; see *In re Jones* ; *Jones v. Caless*,  
 10 Ch. D. 40.

Upon this principle, if a mixed residue of pure and im-  
 pure personalty is given to a charity, so that the gift fails  
 as regards the impure personalty, the latter will not be the  
 primary fund as against the other portion, the gift of  
 which takes effect, but debts will be payable rateably out  
 of both. *A.-G. v. Lord Winchelsea*, 3 B. C. C. 373 ; S. C.  
 nom. *A.-G. v. Hurst*, 2 Cox, 364 ; *Blann v. Bell*, 7 Ch. D.  
 382.

II. Real estate devised or ordered to be sold for payment II. Real  
estate  
devised for  
payment of  
debts.  
 of debts, whether it descends to the heir or not. *West v.*  
*Lawday*, 1 R. 2 Eq. 517 ; *Phillips v. Parry*, 22 B. 279 ;  
*Stead v. Hardaker*, 15 Eq. 174.

III. Real estate descended not charged with debts. III. Real estate not charged with debts which descends, because no disposition has been attempted. *Davies v. Topp*, 1 B. C. C. 527; *Harmood v. Oglander*, 8 Ves. 125; *Manning v. Spooner*, 3 Ves. 117.

IV. Real estate charged with debts and devised or descended. IV. Real estate charged with payment of debts and devised or descended rateably. *Wood v. Ordish*, 3 Sm. & G. 125; *Peacock v. Peacock*, 13 W. R. 516; 34 L. J. Ch. 315; *Ryves v. Ryves*, 11 Eq. 539; *Stead v. Hardaker*, 15 Eq. 175; *Barber v. Wood*, 4 Ch. D. 885; see, however, *Williams v. Chitty*, 3 Ves. 545.

V. General legacies. V. General pecuniary legacies rateably. *Collins v. Lewis*, 8 Eq. 708; *Dugdale v. Dugdale*, 14 Eq. 234; *Tomkins v. Colthurst*, 1 Ch. D. 626; *Farquharson v. Flower*, 3 Ch. D. 109; see *Hensman v. Fryer*, 3 Ch. 420.

Whether lapsed legacy is applicable before those effectually given. 1. As between general legacies the further question may arise if there is no residuary gift, whether a lapsed pecuniary legacy exonerates those that take effect:—

a. Where all the legacies are subject to a charge of debts, a lapsed pecuniary legacy only contributes rateably. *Howse v. Chapman*, 4 Ves. 542.

b. Where there is no charge of debts possibly on the principle of *Gowan v. Broughton*, 19 Eq. 77, and *Scott v. Cumberland*, 18 Eq. 578, a lapsed legacy may be primarily applicable; see, however, p. 619, *ante*; and see *In re Ham's Trusts*, 2 Sim. N. S. 106.

What are general legacies for purposes of abatement. 2. As to what are general legacies for the purpose of abatement:—

Legacy duty directed to be paid on a specific legacy is a general legacy and abates with the general legacies. *Farrar v. St. Catherine's Coll.*, 16 Eq. 19; see *Wilson v. O'Leary*, 17 Eq. 419.

And annuities for the purpose of abatement rank with general legacies. *Miller v. Huddlestons*, 1 Mac. & G. 513.

Rent charges. A rent charge, however, or annuity issuing out of the land has priority over legacies charged upon the land in

the event of deficiency of the personalty. *Creed v. Creed*, 11 Cl. & F. 491.

In estimating the value of annuities for purposes of abatement their value is to be taken at the time when the estimate is made; thus the value of the annuity of an annuitant who is dead, is the sum of the payments which would have been made to him in respect of it, and the value of a reversionary annuity which has come into possession is its present value at the time of abatement, *plus* any arrears due upon it. *Todd v. Bielby*, 27 B. 353; *Potts v. Smith*, 8 Eq. 683.

How the value of annuities is to be calculated.

Where legacies and annuities are charged on real estate, powers of distress and entry conferred upon the annuitants do not give the annuities priority over the legatees. *Roper v. Roper*, 3 Ch. D. 714.

### 3. Priority of general legacies, *inter se*:—

a. As between general legatees, legacies given for valuable consideration, as for debts or instead of dower, have priority. *Blower v. Morrett*, 2 Ves. sen. 420; *Heath v. Dendy*, 1 Russ. 543; *Norcott v. Gordon*, 14 Sim. 258; *Bell v. Bell*, 6 Ir. Eq. 239; *Davies v. Bush*, 1 You. 341; *Stahlschmidt v. Lett*, 1 Sm. & G. 421.

Legacies for valuable consideration have priority.

A legacy, however, in lieu of dower, where the testator has no land out of which the widow is dowable, has no priority. *Acey v. Simpson*, 5 B. 35; *Roper v. Roper*, 3 Ch. D. 714.

A legacy to an executor for his trouble has no priority. *Duncan v. Watts*, 16 B. 204.

A legacy to the testator's wife to be paid immediately after his decease has recently been held to have priority. *In re Hardy*; *Wells v. Barwick*, 50 L. J. Ch. 241; see, however, *Blower v. Morret*, 2 Ves. sen. 420; *Roche v. Harding*, 7 Ir. Ch. 338.

b. Legacies payable at the death of a tenant for life or at some other future period, do not abate before other

Time of payment

creates no priority. legacies. *Miller v. Huddleston*, 3 Mac. & G. 513; *Street v. Street*, 2 N. R. 56; *Nickisson v. Cockill*, 3 D. J. & S. 622.

Legacies introduced by "firstly," "secondly." The words "in the first place," "in the next place," or the word "afterwards," used in introducing legacies, create no priority between them. *Thwaites v. Forman*, 1 Coll. 409; *Beeston v. Booth*, 4 Mad. 161; *Whitehouse v. Insole*, 7 L. T. N. S. 400; see *In re Hardy*; *Wells v. Barwick*, 50 L. J. Ch. 241.

Legacies given on supposition of a surplus. c. But legacies given on the supposition that there will be more than enough to pay prior legacies abate first. *A.-G. v. Robins*, 2 P. Wms. 23; *Stammers v. Halliley*, 12 Sim. 42.

Legacies for life applicable on the death of the legatees. And a direction that certain legacies given for life are to become applicable on the death of the legatees to the payment of other legacies will give the legatees for life priority. *Brown v. Brown*, 1 Kee. 275; see *Haynes v. Haynes*, 3 D. M. & G. 590.

Real estate subject to annuities made applicable in aid of personalty. And where real estate given, subject to certain annuities, is made applicable in aid of the personalty to the payment of legacies subject to those annuities, the annuities have priority over the legacies. *Earl of Portarlington v. Damer*, 4 D. J. & S. 161; see *Coore v. Todd*, 7 D. M. & G. 520.

And, of course, when a particular legacy is given and the residue is then distributed in certain sums, the particular legacy has priority over all the others. *Gyett v. Williams*, 2 J. & H. 429; see *In re Hardy*; *Wells v. Barwick*, 50 L. J. Ch. 241.

#### 4. Priority between general and residuary legatees:—

General legacies have priority over residue. a. As a general rule the residuary legatee is entitled to nothing till all the particular legacies given by the will are satisfied in full.

Thus, a gift of the rest of a specific fund after payment of debts and funeral expenses, where legacies have been

given as well, is a gift of the residue after payment of the legacies as well as the debts and funeral expenses. *Foxen v. Foxen*, 3 N. R. 452; 13 W. R. 33.

In the same way, where a fund is set apart to pay annuities and is directed upon the death of the annuitants respectively to fall into the residue, if the fund is insufficient to pay the annuities, the residuary legatee is entitled to nothing till all the legacies and annuities have been paid in full. *Arnold v. Arnold*, 2 M. & K. 374; *Anderson v. Anderson*, 33 B. 223; *In re Tootal's Estate*, 2 Ch. D. 628.

Fund set apart to pay annuities.

b. It would seem that a direction that in the event of insufficiency of assets all the beneficiaries are to abate does not entitle the residuary legatee to a fund which is released by the death of a tenant for life. *In re Lyne's Estate*; *Sands v. Lyne*, 8 Eq. 482.

Direction for abatement.

On the other hand, if annuities are directed to abate in avour of legatees or *vice versa*, in the event of deficient assets the abatement is permanent and a fund falling in is not applicable to increase gifts which have abated. *Farmer v. Mills*, 4 Russ. 86; *Hichens v. Hichens*, 25 W. R. 249.

c. Upon similar principles, where assets have been lost after the death of the testator, the loss falls on the residuary legatee in the first instance. *Wilmot v. Jenkins*, 1 B. 401; *Baker v. Farmer*, L. R. 3 Ch. 537. *Dyose v. Dyose*, 1 P. Wms. 305, is overruled; see *Fonereau v. Poyntz*, 1 B. C. C. 478; *Humphreys v. Humphreys*, 2 Cox, 186; *Baker v. Farmer*, *supra*.

Loss of assets falls on the residue.

On the other hand, if the legatees assent to an appropriation of a particular sum in payment of their legacies, they are only entitled to the sum so appropriated and must abate if that sum proves insufficient, whether through loss of assets or otherwise. *Ex parte Chadwin*, 3 Sw. 380.

Assent by legatees to appropriation.

**Appropriation.** An appropriation in satisfaction of a legacy in order to bind a legatee must be in the 3 per cents. *Prendergast v. Prendergast*, 3 H. L. 195; *Stewart v. Sanderson*, 10 Eq. 26.

**VI. Real estate devised not charged with debts and specific gifts.** VI. Real estate devised, not charged with debts, including residuary real estate and specifically bequeathed personal estate rateably. *Hensman v. Fryer*, 3 Ch. 420 (see *Lancefield v. Iggulden*, 10 Ch. 136); *Jackson v. Pease*, 19 Eq. 96.

**Lapsed realty.** It seems to be the better opinion that real estate devised not charged with debts but descending by reason of lapse is applicable in the same order. *Blann v. Bell*, 47 L. J. Ch. 120; 7 Ch. D. 382; *Luckcraft v. Pridham*, 48 L. J. Ch. 636. *Scott v. Cumberland*, 18 Eq. 578, would probably not be followed; see *Astley v. Micklethwait*, 15 Ch. D. 59, 66; *Trethewy v. Helyar*, 4 Ch. D. 53; *Row v. Row*, 7 Eq. 414.

**Devise subject to rent-charge.** In the case of land devised subject to a rent-charge or annuity, the rent-charge and the land abate rateably. *Long v. Short*, 1 P. Wms. 403; *Jackson v. Hamilton*, 9 Ir. Eq. 430; see *Raikes v. Boulton*, 29 B. 41.

**VII. Property appointed.** VII. Property appointed by the will under a power of appointing, whether by deed or will or by will only. *Fleming v. Buchanan*, 3 D. M. & G. 976; *Hawthorn v. Shedden*, 3 Sm. & G. 305; *Petre v. Petre*, 14 B. 197; *Williams v. Lomas*, 16 B. 1.

Property appointed by a married woman under a power of appointing by deed or will or by will only, is applicable in the same order. *London Chartered Bank of Australia v. Lemprière*, L. R. 4 P. C. 572; *Mayd v. Field*, 3 Ch. D. 587; *In re Harvey's Estate*; *Godfrey v. Harden*, 13 Ch. D. 216.

**VIII. Land is governed by the *lex loci*.** VIII. Land in a foreign country is governed by the *lex loci rei sitæ* and is only liable to such debts as would be east upon it by the law of that country. *Harrison v. Harrison*, 8 Ch. 342.



## COSTS OF ADMINISTRATION.

The costs of an administration action are not debts within the meaning of a charge of debts. *Stringer v. Harper*, 26 B. 585. Costs of administration not debts.

The order of assets for payment of such costs is not in all respects the same as that for payment of debts.

If a particular fund is appointed they are payable out of that.

It is now settled that a direction to pay testamentary expenses includes the costs of an administration action. *Morrell v. Fisher*, 4 De G. & Sm. 422; *Miles v. Harrison*, 9 Ch. 316; *Harloe v. Harloe*, 20 Eq. 471; *Penny v. Penny*, 11 Ch. D. 440. Testamentary expenses include costs of action.

The term executorship expenses has the same meaning. *Sharp v. Lush*, 10 Ch. D. 468. Executorship expenses.

Costs of an administration suit have been held to be included under "funeral and other expenses" and "legal expenses." *Webb v. De Beauvoisin*, 31 B. 573; *Coventry v. Coventry*, 2 Dr. & Sm. 470. Funeral and other expenses.

But the words "debts and costs of proving the will" do not include costs of a suit. *Stringer v. Harper*, 26 B. 585; see *Alsop v. Bell*, 24 B. 451.

*Browne v. Groombridge*, 4 Mad. 495, and *Gilbertson v. Gilbertson*, 34 B. 354, where the costs of a special case were held not included in testamentary expenses, and *In re Biel's Estate*, 16 Eq. 577, may be considered overruled. Costs of special case.

A fund charged with payment of testamentary expenses need not be retained by the executors for more than a year if no action is apprehended. *In re Cope's Trusts*, 36 L. T. N. S. 437.

If no particular fund is appointed by the testator, costs of administration are payable out of the personal estate. Personal estate liable for costs.

*Ripley v. Moysey*, 1 Kee. 578; *Pickford v. Brown*, 2 K. & J. 426; *Jackson v. Pease*, 19 Eq. 96.

What costs are included.

The costs of administration include the costs of getting in any part of the personal estate which is in a foreign country and the payment of all duties necessary for that purpose. *Peter v. Stirling*, 10 Ch. D. 279.

The costs of deciding any question of construction upon the will, though it arises only with regard to a single legacy or a settled share, are payable out of residue. *Boulton v. Beard*, 3 D. M. & G. 608.

Costs of ascertaining classes.

And in the same way the costs of ascertaining the persons or classes of persons entitled to gifts general or residuary under the will are costs of administration. *In re Reeve's Trusts*, 4 Ch. D. 841.

Title to lapsed share of residue.

The costs of ascertaining the persons entitled to a lapsed share of residue must be borne by that share. *Chatteris v. Young*, Beames on Costs, 390; *Skrymsner v. Northcote*, 1 Sw. 566.

Mixed residue bears costs rateably.

Where the residue is composed of the proceeds of sale of realty directed to be converted and of personalty, given together as a mixed fund, costs of administration are payable out of the mixed fund rateably, and a lapsed share will not be applied before shares well disposed of. This is the case though the personalty may not be exonerated for the purpose of paying debts. *Luckcraft v. Pridham*, 48 L. J. Ch. 636.

Unappointed fund not first liable.

In the case of a fund subject to a power the costs of administration will be borne rateably by appointed and unappointed shares. *Warren v. Postlethwaite*, 2 Coll. 108, 116; *Trollope v. Routledge*, 1 De G. & Sm. 662; *Moore v. Dixon*, 15 Ch. D. 566.

Devised and lapsed estates.

It seems that devised and lapsed estates bear costs rateably. *Maddison v. Pye*, 32 B. 658; *Bagot v. Legge*, 2 Dr. & Sm. 259; see, however, *Scott v. Cumberland*, 18 Eq. 578, and cases cited *ante*, p. 624.

The heir cannot be made liable to pay the probate duty. *Probate duty.*  
*Shepherd v. Beetham*, 6 Ch. D. 597.

Costs of administration have precedence over any other costs directed to be paid out of the estate; for instance, costs of a suit in the Probate Division. *In re Mayhew*; *Rowles v. Mayhew*, 5 Ch. D. 596.

## MARSHALLING.

## I. General rules.

Where a fund has been applied out of its proper order in the administration of assets, the persons who would have been entitled to the fund may claim for the amount so applied against the fund, which ought to have been applied in priority to their own. See *Tombs v. Roch*, 2 Coll. 490; *In re Mower's Trusts*, 8 Eq. 110.

Thus, legatees may stand against descended realty or against realty charged with debts, if the personalty has been exhausted in payment of debts. *Foster v. Cook*, 3 B. C. C. 347; *Paterson v. Scott*, 1 D. M. & G. 531; *Rickard v. Barrett*, 3 K. & J. 289.

So, too, a general pecuniary legatee is entitled to stand against the mortgaged land in the place of a mortgagee who has exhausted the personal estate in payment of the mortgage. *Forrester v. Leigh*, Amb. 172; *Wythe v. Henninger*, 2 M. & K. 635; *Binns v. Nichols*, L. R. 2 Eq. 256.

Pecuniary legatees are, however, not entitled to have the assets marshalled against residuary devisees, where the land is not charged with debts. *Hensman v. Fryer*, 3 Ch. 420; *Collins v. Lewis*, 8 Eq. 708; *Dugdale v. Dugdale*, 14 Eq. 234.

Upon similar principles it has been held that legatees are entitled to stand in the place of the vendor against an estate purchased by the testator and paid for after his

purchase money. death out of the general personal estate. This is clear where the estate has descended. *Sproule v. Prior*, 8 Sim. 189.

And it has been so held where the estate is devised. *Birds v. Askey*, 24 B. 618; *Lord Lilford v. Powys Keck*, L. R. 1 Eq. 347. *Wythe v. Henniker*, 2 M. & K. 635, is *contra*; see *Barnwell v. Iremonger*, 1 Dr. & S. 255.

Between legatees with and without a charge on realty. So, too, the principle of marshalling applies between legatees, some of whose legacies are charged upon realty and others not. *Hanby v. Roberts*, Ambl. 127; 2 Coll. 512; Dick. 104.

But this is not the case if the claim against one of the funds fails; if, for instance, where the legacy is charged on land, the legatee dies before the time of payment. *Prowse v. Abingdon*, 1 Atk. 482; *Pearce v. Loman*, 3 Ves. 135.

Of course persons whose fund has been applied in its proper order have no right to stand in the place of a creditor against a fund not applicable till after their own. *Douglas v. Cooksey*, L. R. 2 Eq. 311.

## II. Marshalling in the case of charities:

Assets not marshalled in favour of charities. When pure and impure personalty is given to charity, the Court will not marshal the assets so as to cast the debts on the impure personalty, unless an intention can be gathered from the will that the assets are to be marshalled. *Gaskin v. Rogers*, L. R. 2 Eq. 284; *Wigg v. Nicholl*, 14 Eq. 92.

In the absence of such an intention the charitable legacies will abate in the proportion of the pure to the impure personalty, the value being taken as at the time of the testator's death. *Calvert v. Armitage*, 2 N. R. 60; *Luckcraft v. Pridham*, 48 L. J. Ch. 636, 639.

Direction that charities are to be paid out of pure personalty. A direction that the charities are to be paid out of pure personalty will give them priority over other legatees as regards the pure personalty, but will not release the pure personalty from bearing its proportion of the debts.

*Robinson v. Geldard*, 3 De G. & Sm. 499; 3 Mac. & G. 735; *Tempest v. Tempest*, 2 K. & J. 635; 7 D. M. & G. 470; *Beaumont v. Oliveira*, 6 Eq. 534; 4 Ch. 309; *Lewis v. Boetefeur*, 38 L. T. N. S. 93; see, however, *Nickisson v. Cockill*, 3 D. J. & S. 622.

But a gift of residue to charity with a direction that the residue so given is to consist of pure personalty, following a provision for payment of debts out of realty and out of residuary personalty only so far as the realty will not extend, throws the debts on the impure personalty in default of realty. *Wills v. Bourne*, 16 Eq. 487.

The same is the effect of a direction to reserve the pure personalty for charities. *Miles v. Harrison*, 9 Ch. 316.

A gift to a charity of such part of the testator's personal estate as he can so bequeath is specific and throws the debts on assets applicable in priority to specific legacies. *Shepherd v. Beetham*, 6 Ch. D. 597.

If the testator exonerates the pure personalty from debts it must nevertheless bear its share of the costs of administration if they are not provided for. *In re Fitzgerald*; *Adolph v. Dolman*, 26 W. R. 53.

## CHARGE OF DEBTS.

### I. What debts it includes:

A direction to pay debts includes all the legal debts of the testator subsisting at his death, but not debts barred by statute. *Burke v. Jones*, 2 V. & B. 275; *Maxwell v. Maxwell*, L. R. 4 H. L. 506; see *Hawkins v. Hawkins*, 13 Ch. D. 470.

A trust for payment of debts will not prevent the statute from continuing to run. *Scott v. Jones*, 4 Cl. & F. 382.

Possibly, a direction to pay specific debts barred by statute would revive them. See *Clinton v. Brophy*, 10

Ir. Eq. 139; *In re Bermingham*, I. R. 4 Eq. 187; *In re Warnock's Estate*, I. R. 11 Eq. 212.

Damages  
accrued  
after the  
death.

A charge of debts will include damages accrued after the testator's death on an equitable liability to indemnify and damages recovered in respect of a covenant broken after the testator's death. *Willson v. Leonard*, 3 B. 373; *Morse v. Tucker*, 5 Ha. 79.

Debts due  
at a parti-  
cular time.

And though there may be words limiting the debts to a particular class of debts, such as debts due at a particular period of the testator's life, the Court will lean to the wider construction, so as to include all the debts. *Bridgman v. Dove*, 2 Atk. 201; *Dormay v. Borradaile*, 10 B. 263; *Bermingham v. Burke*, 2 J. & Lat. 699.

Direction  
to pay  
debts of  
another.

A direction to pay the debts of another person includes the debts subsisting at his death, but not debts barred by statute. *O'Connor v. Haslam*, 5 H. L. 170; see, too, *Martin v. Smith*, 3 L. R. Ir. 417; 5 ib. 266.

Direction  
to deduct  
debts due  
from a  
legatee.

But a direction to deduct from the share of a legatee the debts due from him to other legatees will include debts barred by statute, where the testator's intention is, that the debts in question should be treated as if they were advances made by himself. *Poole v. Poole*, 7 Ch. 17.

So where a share of residue is given to a person and a debt due from him is directed to be deducted, the whole debt and not merely what can legally be recovered is to be deducted. *Matthews v. Keble*, 4 Eq. 467; 3 Ch. 691.

II. Upon what property a charge of debts and legacies attaches:

Charge of  
debts and  
legacies  
extends to  
specific  
devisees.

A charge of debts and legacies on all the property of the testator charges them on specifically devised real estate. *Maskell v. Farrington*, 3 D. J. & S. 338; *Mannox v. Greener*, 14 Eq. 456; see *Earl of Portarlington v. Damer*, 4 D. J. & S. 161.

A charge of debts and legacies by the will would not

affect lands specifically devised by a codicil. *Quain v. Harvey*, 5 L. R. Ir. 622; *Wheeler v. Claydon*, 16 B. 169.

A general charge of legacies merely will not be extended to lands specifically devised, but will be confined to residuary lands. *Spong v. Spong*, 1 Y. & J. 300; 3 Bl. N. S. 84; 1 D. & Cl. 365; *Conron v. Conron*, 7 H. L. 168; *Campbell v. McConaghy*, I. R. 6 Eq. 20.

Charge of legacies only is confined to residuary lands.

It seems indifferent whether the lands specifically given are expressly subject to certain other charges or not. *Ib.*

### III. How a charge of debts is created :

It seems a gift of a rent-charge without more would effect a charge on all the testator's lands. *Ex parte McDowall*, 5 Jur. N. S. 553.

Devise of a rent-charge.

A charge of debts upon realty "in case the personal estate should be insufficient for their payment" is in effect a general charge of debts, as the additional words only express what would be implied without them. *Greetham v. Colton*, 34 B. 615.

Charge on realty in case the personalty should be insufficient.

The time for ascertaining whether the personalty is sufficient is the death of the testator. If the personal estate becomes insufficient through the fault of the executors, the charge will not take effect unless the defaulting executors are also devisees of the land. *Humble v. Humble*, 2 Jur. 696; *Howard v. Chaffers*, 2 Dr. & Sm. 236; *Richardson v. Morton*, 13 Eq. 123.

When sufficiency ascertained.

#### 1. General direction to pay debts :

It is now clearly settled that a general direction to pay debts charges them upon real estate devised by the will. *Clifford v. Lewis*, 6 Mad. 33; *Ball v. Harris*, 8 Sim. 485; 4 M. & Cr. 264; *Shaw v. Borrer*, 1 Kee. 559; *Harding v. Grady*, 1 D. & War. 430; *Elliot v. Montgomery*, I. R. 7 Eq. 214.

General direction to pay debts charges realty.

Whether real estate would be charged by such a direction where the will only attempts to dispose of personalty seems doubtful. The remarks of Sir R. P. Arden, in

Whether realty left to descend would be charged.

*Shallcross v. Finden*, 3 Ves. 739, probably only contemplate a case of lapse.

Subsequent express charge of certain debts on particular estates.

A subsequent express charge of particular debts upon certain estates or upon all the real estate, will not overrule the general direction. *Taylor v. Taylor*, 6 Sim. 246; *Forster v. Thompson*, 4 D. & War. 303. *Douce v. Lady Torrington*, 2 M. & K. 600, is overruled.

Subsequent charge of all debts on personality.

Nor will a subsequent express charge of all the debts upon the personality. *Price v. North*, 1 Ph. 85; *Graves v. Graves*, 8 Sim. 43; *Hartland v. Murrell*, 27 B. 204.

Subsequent charge of all debts upon portions of the realty.

But a subsequent express charge of all the debts upon particular portions of the realty would, it seems, overrule the general direction. *Palmer v. Graves*, 1 Kee. 545. This distinction reconciles the case with those previously cited; but *quære*, whether it is substantial.

Exception of certain real estate out of a subsequent charge.

So, too, if certain real estate is expressly excepted out of a subsequent charge of debts upon a portion of the realty, the general direction is controlled. *Thomas v. Britnell*, 2 Ves. sen. 313.

Express charge not controlled by partial charges.

Of course an express charge of debts on real and personal estate is not controlled by subsequent partial charges. *Wrigley v. Sykes*, 21 B. 337.

## 2. Direction to executors to pay debts:

Direction to executors to pay debts will not charge realty where no land is devised to them.

a. Again, if the executor is directed to pay the debts, they are not charged upon the real estate unless real estate is expressly devised to him. *Keeling v. Brown*, 5 Ves. 359; *Powell v. Robins*, 7 Ves. 209; *Cook v. Dawson*, 29 B. 123; 3 D. F. & J. 127.

A direction to an executor to pay debts, followed by a devise to another person introduced by the word "then," will not charge the land. *Brydges v. Landen*, 3 Russ. 346, n.; 3 Ves. 550; *Willan v. Lancaster*, 3 Russ. 108.

But if the real estate is devised "subject as aforesaid," it is charged. *Dowling v. Hudson*, 17 B. 248.

Land de-

b. If land is devised to the executors, whether in trust



or not, it is charged with debts. *Barker v. Duke of Devonshire*, 3 Mer. 310; *Henvell v. Whitaker*, 3 Russ. 343; *Dormay v. Borradaile*, 10 B. 263; *Hartland v. Murrell*, 27 B. 204; *Bentley v. Robinson*, 10 Ir. Ch. 293; see *In re Bailey*, 12 Ch. D. 268.

So legacies directed to be paid by the executor will be a charge on land specifically devised to him. *Alcock v. Sparhawk*, 2 Vern. 228; 1 Eq. Ca. Ab. 198, pl. 4; *Preston v. Preston*, 2 Jur. N. S. 1040; *Gallimore v. Gill*, 2 Sm. & G. 158; 4 W. R. 773. The point is, however, not free from doubt: see *Parker v. Fearnley*, 2 S. & St. 592; *Cross v. Kennington*, 9 B. 150; 10 Jur. 343; 15 L. J. Ch. 167.

It makes no difference apparently that the devise is of an estate tail or of an estate tail for life. *Cloudsley v. Pelham*, 1 Vern. 411; 1 Eq. Ab. 198, pl. 2; *Harris v. Watkins*, Kay, 438; *Cook v. Dawson*, 29 B. 123; see *Finch v. Hattersley*, 3 Russ. 345, n.; *Doe d. Ashby v. Baines*, 2 C. M. & R. 23.

On the other hand, if land is devised only to one of several executors or unequal interests are devised to them, the land is not charged. *Warren v. Davies*, 2 M. & K. 49; *Symons v. James*, 2 Y. & C. C. 301; *Wasse v. Helsington*, 3 M. & K. 495; *Bailey v. Bailey*, 12 Ch. D. 268.

A gift of real and personal estate after payment of debts charges both. *Withers v. Kennedy*, 2 M. & K. 607; *Moore v. Whittle*, 22 L. J. Ch. 207.

3. When debts are directed to be paid, and there is a gift of the residue of the real and personal estate together, the legacies and debts are charged upon the entire residue. *Greville v. Browne*, 7 H. L. 689; *Gainsford v. Dunn*, 17 Eq. 405; *In re Bailey*, 12 Ch. D. 268, 274.

The charge extends to real estate which is enumerated in the residuary devise. *Thorman v. Hilhouse*, 7 W. R. 332; 5 Jur. N. S. 563; *Bray v. Stevens*, 12 Ch. D. 162; see *Castle v. Gillett*, 16 Eq. 530.

The rule applies whether the residuary gift follows or precedes the gift of legacies. *Elliott v. Dearsley*, 16 Ch. D. 322.

It is immaterial whether interests in land have been already given by the will or not. *Bench v. Biles*, 4 Mad. 187; *Francis v. Clemow*, Kay, 435; *Wheeler v. Howell*, 3 K. & J. 198.

The fact that the executors are directed to pay debts and legacies, the residuary realty and personalty being devised to other persons, will not exclude the rule. *In re Brooke*; *Brooke v. Rooke*, 3 Ch. D. 630.

Gift must  
be of  
residue.

The rule does not apply where the gift is not of the "residue" of the real and personal estate. *Symons v. James*, 2 Y. & C. C. 301.

Personalty  
given in  
certain  
shares.

Where the whole personal estate is disposed of in certain proportions, the sums so given out of the personalty will not be charged on the realty by a residuary gift. *Gyett v. Williams*, 2 J. & H. 429.

#### 4. Charge upon income or corpus :

Power to  
raise out of  
rents and  
profits to  
pay debts  
or legacies.

It would seem that a power to raise money out of the rents and profits would naturally mean out of the annual rents and profits, but the cases show that a power to raise a lump sum out of rents and profits will authorise a sale. See *Bootle v. Blundell*, 1 Mer. 233, *per* Lord Eldon; *Baines v. Dixon*, 1 Ves. sen. 42.

This is clear at any rate where the object is to pay debts or legacies. *Lingon v. Foley*, 2 Ch. Ca. 205; *Anon.* 1 Vern. 104; *Berry v. Askham*, 2 Vern. 26; *Metcalf v. Hutchinson*, 1 Ch. D. 591; *Lord Londesborough v. Somerville*, 19 B. 295.

Money  
payable  
within a  
given time.

Or, if the money is to be raised within a given time, and the annual rents would be insufficient to raise the money within that time. *Sheldon v. Dormer*, 2 Vern. 310; *Warburton v. Warburton*, *ib.* 420; *Gibson v. Lord Montfort*, 1 Ves. sen. 491.

Portions, it would seem, are on the same footing as Portions. debts, as it is to be presumed that they are to be paid within a limited time. *Trafford v. Ashton*, 1 P. Wms. 415; *Stanhope v. Thacker*, Prec. Ch. 435.

Similarly, if a gross sum payable out of rents and profits is payable at once, it may be raised by sale. *Allan v. Backhouse*, 2 V. & B. 65; Jac. 631. Gross sum payable at once.

But if the testator treats the rents and profits as applicable for some time for the purpose of raising the money, and gives the whole lands from and after raising the money, the power will be limited to the annual rents and profits. *Small v. Wing*, 5 B. P. C. 68; see *Harper v. Munday*, 7 D. M. & G. 369; *Heneage v. Lord Andover*, 3 Y. & J. 360; *Lord Lovat v. Duchess of Leeds*, 10 W. R. 398. When the annual rents only are applicable.

Where a jointure was charged upon lands devised to several devisees and the income of a portion was fluctuating, the jointure was apportioned between the devisees in proportion to the actual income received in each year. *Ley v. Ley*, 6 Eq. 174.

In the case of fines for renewal of leaseholds given for life with remainders, the Court will, as a rule, apportion the fine between tenant for life and remainderman, according to their enjoyment, though it may be directed to be raised out of the "rents and profits, or by mortgage." *Greenwood v. Evans*, 4 B. 44; *Jones v. Jones*, 5 Ha. 440; *Reeves v. Creswick*, 3 Y. & C. Ex. 715; Lewin on Trusts, p. 323; *Ainslie v. Harcourt*, 28 B. 313. Fines for renewing leaseholds given in succession.

But if the fine is to be paid out of the "annual rents," it must be borne entirely by the tenant for life. *Solley v. Wood*, 29 B. 482.

It is often a question of some difficulty whether an annuity is payable out of the corpus or only out of the income of a fund set aside for its payment.

a. If the annuity is plainly charged upon the corpus it is of course liable to make good arrears. *Picard v. Express charge on corpus.*

*Mitchell*, 14 B. 103; *Howarth v. Rothwell*, 30 B. 516; *Stamper v. Pickering*, 9 Sim. 176; *Wroughton v. Colquhoun*, 1 De G. & Sm. 36, 357; *Hickman v. Upsall*, 2 Giff. 124; *Gordon v. Bowden*, 6 Mad. 342; *Swallow v. Swallow*, 1 B. 432, n.; *Torre v. Browne*, 5 H. L. 555; *Haynes v. Haynes*, 3 D. M. & G. 590; *Lazonby v. Rawson*, 4 D. M. & G. 556; *Upton v. Vanner*, 1 Dr. & Sm. 594; *Horton v. Hall*, 17 Eq. 437; *Pearson v. Helliwell*, 18 Eq. 411.

Direction  
to set apart  
a fund  
which is to  
fall into  
the residue.

b. And if there is a clear gift of an annuity, a direction to set a fund apart to secure it which is to fall into the residue upon the death of the annuitant, does not disentitle the annuitant to have arrears made up out of corpus, since the direction is merely a means to the end. The question is then merely between the annuitant and the residuary legatee. *Bright v. Larcher*, 3 De G. & J. 148; *Davies v. Wattier*, 1 S. & St. 463; *May v. Bennett*, 1 Russ. 370; *Miner v. Baldwin*, 1 Sm. & G. 522; *Wright v. Callender*, 2 D. M. & G. 652; *Croly v. Weld*, 3 D. M. & G. 993; *Ingleman v. Worthington*, 1 Jur. N. S. 1062; *Mills v. Drewitt*, 20 B. 632; *Perkins v. Cooke*, 2 J. & H. 393; *Anderson v. Anderson*, 33 B. 223; *Magill v. Murphy*, 1 L. R. Ir. 196; *Carmichael v. Gee*, 5 App. C. 588.

It makes no difference that the fund if directed to fall into the residue after the death of the annuitant may go to persons other than the residuary legatees. *Wright v. Callender*, *supra*.

In these cases the direction to set apart a fund, in fact amounts to a charge upon the corpus.

Direction  
to set apart  
a fund to  
pay an an-  
nuity out  
of the divi-  
dends with  
gift over.

c. But if there is a direction to set apart a sum of money in order to pay an annuity out of the dividend with a gift over, the annuitant is not entitled to come upon the corpus and it is a simple case of tenant for life and remainderman. *A.-G. v. Poulden*, 3 Ha. 555; *Baker*

*v. Baker*, 6 H. L. 616; *Hindle v. Taylor*, 20 B. 109; *Miller v. Huddleston*, 17 Sim. 71; 3 Mac. & G. 513; *Michell v. Wilton*, 23 W. R. 789.

d. When, however, the annuity is charged upon the income of the whole estate there is more difficulty. If the capital is given over "subject to" or "after payment" of the annuities the corpus is liable. *Phillips v. Gutteridge*, <sup>Annuity charged upon income of whole estate.</sup> 11 W. R. 12; 8 Jur. N. S. 1196; 32 L. J. Ch. 1; 4 De G. & J. 531; *Stamper v. Pickering*, 8 Sim. 176; *Playfair v. Cooper*, 17 B. 187; *Ex parte Wilkinson*, 3 De G. & S. 633; *Perkins v. Cooke*, 2 J. & H. 393; *Re Tyndall*, 7 Ir. Ch. 181; *Percy v. Percy*, 35 B. 295; *Carter v. Salt*, 1 R. 1 Eq. 97; *Bell v. Bell*, 1 R. 6 Eq. 239; *Birch v. Sherratt*, 4 Eq. 58; 2 Ch. 644; *In re Mason*; *Mason v. Robinson*, 8 Ch. D. 411.

e. But if there is anything to show that the corpus is looked upon as entire after the annuitant's death; if, for instance, it is given over immediately upon the death of the annuitant, or the trust then comes to an end, or it is then directed to be sold, or if the corpus is devised in strict settlement, it is not liable to make good arrears. *Foster v. Smith*, 1 Ph. 629; *Addecott v. Addecott*, 29 B. 460; *Re Kelly*, 9 Ir. Ch. 103; *Forbes v. Richardson*, 11 Ha. 354; *Tarbottom v. Earle*, 11 W. R. 680; *Darbon v. Rickards*, 14 Sim. 537; *Earle v. Bellingham* (No. 1), 24 B. 445; *Sheppard v. Sheppard*, 32 B. 194; *Taylor v. Taylor*, 17 Eq. 324. <sup>Corpus treated as remaining entire at the annuitant's death.</sup>

And if it is clear that the annuity is to be paid only out of the income of each year, by a gift, for instance, of the surplus income of each year as it accrues to others, the corpus is *a fortiori* not liable. *Stelfox v. Sugden*, John. 234; *Darbon v. Rickards*, 14 Sim. 537; *Sheppard v. Sheppard*, 32 B. 194. <sup>Gift of surplus income of each year.</sup>

f. In some cases the further question arises whether, supposing the annuity not to be charged upon corpus, it <sup>When an annuity is a continu-</sup>

ing charge on the annual rents. is a continuing charge on the rents and profits, so that arrears will have to be made up out of surplus income during the annuitant's life, and even after his death; and if there is nothing to show that the annuity was to be confined to the income of each year, as in *Stelfox v. Sugden*, or that it was to determine immediately on the annuitant's death, as in *Foster v. Smith*, 1 Ph. 629; *Earle v. Bellingham*, 24 B. 445, arrears will be a continuing charge during the annuitant's life and after his death. *Forbes v. Richardson*, 11 Ha. 354; *Phillips v. Phillips*, 8 B. 193; *Phillips v. Gutteridge*, 3 D. J. & S. 332; *Taylor v. Taylor*, 17 Eq. 324; *Booth v. Coulton*, 5 Ch. 684; *Salvin v. Weston*, 14 W. R. 757.

### EXONERATION OF PERSONALTY.

#### I. By express words:

Exoneration by express words.

The personal estate is the primary fund for payment of debts, but it may be exonerated by express words. *Morrow v. Bush*, 1 Cox, 185; *Young v. Young*, 26 B. 522; *Dawes v. Scott*, 5 Russ. 32; *Forrest v. Prescott*, 10 Eq. 545.

Gift over of the fund is not necessary.

A direction not to pay debts out of a specific fund of personalty is effectual without a gift over of the fund, though the fund may not be specifically disposed of, but falls into the residue. *Coventry v. Coventry*, 2 Dr. & S. 470.

When the personalty is given exonerated from debts, it is not applicable to their payment till everything else is exhausted. *Morrow v. Bush*, 1 Cox, 185; *Young v. Young*, 26 B. 522.

On the other hand, if land is given in exoneration of the personalty, the personalty is primarily liable if the land so given is insufficient. *Colville v. Middleton*, 3 B. 570.

Similarly as between land and residue, both given exempt from debts, the residue is primarily liable on failure of other funds. *Lord Brooke v. Earl of Warwick*, 1 H. & T. 142.

And personalty disposed of exempt from debts is ex- Whether emptied only for the purposes of that disposition and not personalty in favour of next of kin. *Waring v. Ward*, 5 Ves. 676; is exonerated in *Dacre v. Patrickson*, 1 Dr. & S. 186. favour of next of kin.

If, however, it is exempted from debts and no disposition is made, it is exempted for all purposes. *Milnes v. Slater*, 8 Ves. 305; 1 Dr. & S. 186. See *Noel v. Noel*, 12 Pr. 214.

## II. Exoneration on the general context:

1. In the absence of express words exonerating the personalty from the payment of debts it is primarily liable, though other funds may be provided.

Thus, neither a charge of debts on the realty, or on a specific portion, nor a devise upon trust for sale for payment of debts, will exonerate the personalty. *White v. White*, 2 Vern. 43; *Walker v. Hardwick*, 1 M. & K. 396; *Ouseley v. Anstruther*, 10 B. 453; *Quennell v. Turner*, 13 B. 240; *Hancox v. Abbey*, 11 Ves. 186; *Collis v. Robins*, 1 De G. & S. 131. What will not exonerate the personalty.

2. Whether a devise upon condition of paying the testator's debts will exonerate the personalty seems doubtful. The better opinion seems to be that it will not. *Bridgman v. Dove*, 3 Atk. 201; *Meade v. Hide*, 2 Vern. 120; and *Welby v. Rockcliffe*, 1 R. & M. 571; *Henry v. Henry*, 1 R. 6 Eq. 286. Devise on condition of paying debts.

But in a case not within Locke King's Act, a devise of mortgaged lands to A., he paying the mortgage, with a subsequent gift of a sum in exoneration of the mortgage, entitles the devisee to that sum and no more. *Lockhart v. Hardy*, 9 B. 379. Gift of a sum in exoneration of a mortgage directed to be paid by devisee.

3. An express charge of certain debts upon the per- Express

charge of certain debts on personality. sonalty does not exonerate it from its primary liability to the other debts. *Brydges v. Phillips*, 6 Ves. 567; *Watson v. Brickwood*, 9 Ves. 447.

Gift of realty and personality together on trust to pay debts. 4. A gift of realty and personality together on trust to pay debts will not exonerate the personality from being primarily liable. *Boughton v. Boughton*, 1 H. L. 406; *Tench v. Cheese*, 6 D. M. & G. 453.

Gift on trust to sell and pay debts. 5. But if the realty is given upon trust for sale and blended with the personality upon trust to pay debts, the realty and personality are liable rateably. *Roberts v. Walker*, 1 R. & M. 752; *Stocker v. Harbin*, 3 B. 479; *Salt v. Chattaway*, 3 B. 576; *Dunk v. Fenner*, 2 R. & M. 557; *Fourdrin v. Gowdey*, 3 M. & K. 383; *Tatlock v. Jenkins*, Kay, 654; *Bedford v. Bedford*, 35 B. 584.

Discretion to trustees to sell realty. And where real and personal estate are given together, with a discretionary power to trustees to sell as often as they should think fit, legacies directed to be paid out of the real and personal estate are payable *pro rata*. *Allan v. Gott*, 7 Ch. 439.

Realty to be sold and form part of personal estate. So, too, if realty is directed to be converted and become part of the personal estate. *Bright v. Larcher*, 3 De G. & J. 148; *Simmons v. Rose*, 6 D. M. & G. 411.

Payments out of income of realty and personality. 6. Where the profits and income of real and personal estate are given in moieties and an annuity is directed to be paid out of one moiety, it will be payable rateably out of the profits and income of the real and personal estate. *Falkner v. Grace*, 9 Ha. 280.

Where profits and income of real and personal estate are to be accumulated during a certain time for the purpose of making certain payments, and the surplus of the whole property is given together to the same persons, the income of the personality remains primarily liable. *Boughton v. Boughton*, 1 H. L. 406.

But if there is no disposition of the surplus and large payments are directed to be made out of the rents and



income of the realty and personality, so that it appears that the testator did not contemplate a surplus, and the real estate is given subject to the payments, the realty and personality are rateably liable. *Howard v. Dryland*, 38 L. T. N. S. 24.

An annuity charged upon land with powers of distress and entry is primarily payable out of personality. *Patching v. Barnett*, 49 L. J. Ch. 665. Annuity charged on land.

7. The fact that a mixed fund of personality and proceeds of sale of realty is created, which is charged with debts and legacies under the rule in *Greville v. Brown* or by a general direction to pay debts, will not exonerate the personality from its primary liability in the absence of a direction to pay the debts and legacies out of the mixed fund. *Luckcraft v. Pridham*, 48 L. J. Ch. 636; *Wells v. Row*, 48 L. J. Ch. 476; *Elliott v. Dearsley*, 16 Ch. D. 322. Charge on mixed fund does not exonerate personality.

8. A charge of debts funeral and testamentary expenses on the realty, which latter it can hardly be supposed the personality would be insufficient to meet, will nevertheless not exonerate the personality. *Walker v. Jackson*, 2 Atk. 624; *Gray v. Minnethorpe*, 3 Ves. 103; *Hartley v. Hurle*, 5 Ves. 540; see *Coote v. Coote*, 3 J. & Lat. 175. Charge of funeral and testamentary expenses on realty.

But where the whole personal estate is given not as a residue but specifically and the realty is subject to all the charges to which the personality would be liable, the personality is exonerated; if, for instance, all the personality is given and the realty is charged with debts, funeral expenses and costs of administration. *Greene v. Greene*, 4 Mad. 148; *Michell v. Michell*, 5 Mad. 69; *Blount v. Hipkins*, 7 Sim. 43; *Gilbertson v. Gilbertson*, 34 B. 354. Personal estate specifically given.

The same rule applies with regard to legacies where the whole personality is given and legacies are charged upon land. *Jones v. Bruce*, 11 Sim. 221; *Lance v. Aglionby*, 27 B. 65. Legacies charged on land where the personality is specifically given.

And where the personalty is specifically given and a particular estate is devised upon trust to pay debts funeral and testamentary expenses, upon failure of that estate the general personalty and the realty are liable *pro rata* to make up the deficiency. *Powell v. Riley*, 12 Eq. 175.

Specific gift of personalty to an executor.

The fact, however, that the gift of all the personalty is to a person appointed executor is a strong argument against the exoneration of the personalty. *Brummel v. Prothero*, 3 Ves. 111; *Aldridge v. Lord Wallscourt*, 1 Ba. & Be. 312.

And when it is doubtful whether the whole personal estate is meant to be given specifically or only as a residue, the fact that funeral and testamentary expenses are not charged on the realty, as well as the debts, is an argument against exoneration. *Collis v. Robins*, 1 De G. & S. 131; *Ouseley v. Anstruther*, 10 B. 453; *Bootle v. Blundell*, 1 Mer. 193; 19 Ves. 494; see *Tower v. Lord Rous*, 18 Ves. 138.

Effect of charge of particular debts on realty.

9. There is no rule to the effect that a charge of particular debts upon realty makes the realty the primary fund for those debts. *Quennell v. Turner*, 13 B. 240; *Noel v. Lord Henley*, 7 Pr. 241; Dan. 211; see *Bickham v. Cruttwell*, 3 M. & Cr. 763.

*Hancox v. Abbey* and *Evans v. Cockeram*.

The cases of *Hancox v. Abbey*, 11 Ves. 179, and *Evans v. Cockeram*, 1 Coll. 428, only establish, that where a debt is already a charge upon realty, a devise of lands including the mortgaged land in trust for sale and payment of the mortgaged debt or a declaration that the mortgage is to be charged upon the land, must mean that it is to be a primary charge on the land, otherwise, as it is already a charge upon realty, the words would have no meaning.

*Hancox v. Abbey*, however, probably comes better under another head, see pp. 639, 643.

*Welby v. Rockcliffe*, 1 R. & M. 571, was decided on the ground that the testator had imposed the condition of paying his debts upon the devisee; and in *Clutterbuck v. Clutterbuck*, 1 M. & K. 15, there was a gift of the residue of the real and personal estate not therein-before otherwise disposed of, showing that the only land given was after payment of the sum directed to be raised to pay debts.

The cases where legacies given out of a particular fund have been held payable out of that fund are also distinguishable. The question in those cases has generally been, not whether the personalty was only secondarily liable, but whether it was liable at all; in other words, whether the legacy was demonstrative or specific. See, for instance, *Dicken v. Edwards*, 4 Ha. 273; *Bessant v. Noble*, 26 L. J. Ch. 236; *Fream v. Dowling*, 20 B. 624; 4 Eq. 145, n.

Distinction between cases of exoneration and specific gifts of interests in land.

10. Where, however, a sum is directed to be raised out of land for payment of debts and the land is not given till after such payment or only the residue of the land is given, there is a strong argument that the land was to be the primary fund. *Hancox v. Abbey*, 11 Ves. 179; *Hale v. Cox*, 3 B. C. C. 322; see *Clutterbuck v. Clutterbuck*, 1 M. & K. 15; *Noel v. Noel*, 12 Pr. 214; Lord St. Leonards's Law of Property, 363, 365; *Ion v. Ashton*, 28 B. 379.

Gift of lands after payment of debts.

## TENANT FOR LIFE AND REMAINDERMAN.

### I. Capital and income.

1. As between tenant for life and remainderman, dividends declared before the death of the tenant for life, though not paid till afterwards, belong to his representatives. *Wright v. Tuckett*, 1 J. & H. 266.

Dividends on shares in a company declared after the

Dividends on shares.

death of the tenant for life, though earned before his death, go to the remainderman. *Mackinley v. Bates*, 31 B. 280.

**Partnership profits.** On the other hand partnership profits declared for a past period are the income of that period. *Ibbotson v. Elam*, L. R. 1 Eq. 188; *Browne v. Collins*, 12 Eq. 586.

**Debts.** Debts are the profits of the period when they are got in. *Maclaren v. Stainton*, 3 D. F. & J. 202; *Edmondson v. Crosthwaite*, 34 B. 30.

A fund created for the protection of property given for life is capital. *Varlo v. Faden*, 1 D. F. & J. 211.

**Power of declaring whether profits are to be capital or income.** 2. When there is a power vested in a duly constituted authority of declaring whether profits shall be added to capital or distributed, the tenant for life is bound by the authority. *Straker v. Wilson*, 6 Ch. 503; *In re. Ezekiel Barton's Trust*, 5 Eq. 238; *Baring v. Ashburton*, 16 W. R. 452; see *In re Cox's Trusts*, 9 Ch. D. 159.

**Bonuses out of capital.** 3. With regard to bonuses, it seems clear that bonuses declared out of capital are capital. *Paris v. Paris*, 10 Ves. 185; *Watts v. Steere*, 13 Ves. 363; *Brander v. Brander*, 14 Ves. 80.

**Bonuses out of profits.** On the other hand, bonuses declared out of profits, whether accumulated profits or not, are income. *Barclay v. Wainwright*, 14 Ves. 66; *Price v. Anderson*, 15 Sim. 473; *Preston v. Melville*, 16 Sim. 163; *Plumbe v. Neild*, 8 W. R. 337; 29 L. J. Ch. 618; *Dale v. Hayes*, 19 W. R. 299; *In re Hopkins' Trust*, 18 Eq. 696; see *Hollis v. Allan*, 14 W. R. 980.

But, perhaps, the case would be different if it could be shown that the payment being out of accumulated profits, such profits were entirely earned before the testator's death. See *Dale v. Hayes, supra*.

**Waste.** 4. A tenant for life cannot commit waste unless expressly made unimpeachable for waste.

**Without** A tenant for life without impeachment of waste,

voluntary waste excepted, is in effect only excused for <sup>impeachment of</sup> permissive waste. *Garth v. Cotton*, 1 Ves. 524, 546; <sup>waste.</sup> 1 Dick. 183.

But the exception of voluntary waste may be qualified so as in effect to entitle the tenant for life to cut timber. *Vincent v. Spicer*, 22 B. 380; see *Wickham v. Wickham*, 19 Ves. 419.

A tenant in fee subject to an executory devise over <sup>Tenant in fee with executory devise over.</sup> may commit legal but not equitable waste. *Turner v. Wright*, Jo. 742; 2 D. F. & J. 234.

And he may be restrained from cutting timber by express words. *Blake v. Peters*, 1 D. J. & S. 345.

a. Tenant for life impeachable for waste may cut timber <sup>Timber for repairs.</sup> for repairs actually about to be done, but he may not sell the timber in order to spend the money in repairs. *Gower v. Eyre*, G. Coop. 156; *Simmons v. Norton*, 7 Bing. 640.

He may, however, sell the timber cut in order to buy timber in a more convenient situation. *Sowerby v. Fryer*, 8 Eq. 417.

b. In the case of a timber estate the tenant for life <sup>Right of tenant for life to the produce of real estate.</sup> is entitled to the proceeds of the periodical cuttings. *Bateman v. Hotchkin*, 31 B. 486; *Bagot v. Bagot*, 32 B. 509, 517.

c. And even where the estate is not a timber estate <sup>Timber cuttings.</sup> the tenant for life is entitled to the rightful cuttings of all trees which are not timber or ornamental or useful to the estate. *Pidgely v. Rawling*, 2 Coll. 275; *Earl Cowley v. Wellesley*, 35 B. 638; S. C., L. R. 1 Eq. 656; see 18 Eq. 807; *Honywood v. Honnywood*, 18 Eq. 306.

d. When timber trees are cut down by order of the <sup>Timber cut by the Court.</sup> Court to improve other trees or because they are decaying, the tenant for life is entitled to the income of the proceeds. *Tooker v. Annesley*, 5 Sim. 235; *Tollemache v. Tollemache*, 1 Ha. 456; *Ferrand v. Wilson*, 4 Ha. 381;

*Earl Cowley v. Wellesley*, L. R. 1 Eq. 657; *Honywood v. Honywood*, 18 Eq. 306.

Timber  
blown  
down.

The capital will belong to the first owner of an estate of inheritance or to the first tenant for life unimpeachable for waste who comes into possession. *Waldo v. Waldo*, 12 Sim. 107; *Phillips v. Barlow*, 14 Sim. 263; *Jodrell v. Jodrell*, 7 Eq. 461; *Lowndes v. Norton*, 6 Ch. D. 139.

Tenant for life unimpeachable cutting down ornamental timber which the Court would have directed to be cut if application had been made to it is entitled to the proceeds. *Baker v. Sebright*, 13 Ch. D. 179.

## II. Residue given to persons in succession.

What is  
residue as  
between  
tenant for  
life and  
remainder-  
man.

As between tenant for life and remainderman, residue is what remains after taking such portion of the capital as, together with the income of such portion for one year, whatever that income may be, is required to pay the testator's debts and legacies. *Allhusen v. Whittell*, 4 Eq. 294; *Lambert v. Lambert*, 16 Eq. 320; *Marshall v. Crowther*, 2 Ch. D. 199.

Property  
properly  
invested.

1. The tenant for life is entitled to the income of so much of the property as is invested on authorized securities from the testator's death. *Brown v. Gellatly*, L. R. 2 Ch. 751.

Unauthor-  
ized secu-  
rities.

2. With regard to unauthorized securities, the tenant for life is entitled from the testator's death to the income which would be produced by the money upon unauthorized security, if invested on authorized security at the end of a year from the testator's death. *Dimes v. Scott*, 4 Russ. 195; *Taylor v. Clark*, 1 Ha. 161; *Brown v. Gellatly*, L. R. 2 Ch. 751.

No allowance can be made to the tenant for life for the fact that securities are sold at a higher or lower rate between two dividends. *Scholefield v. Redfern*, 2 Dr. & Sm. 173; *Freman v. Whitbread*, 1 Eq. 266.

Property

3. With regard to property which cannot be converted

within the year or which is retained for the convenience of the estate, the tenant for life is entitled from the testator's death to interest at 4 per cent. upon the then value of such property. *Meyer v. Simonsen*, 5 De G. & S. 723; *Brown v. Gellatly*, L. R. 2 Ch. 751; *Furley v. Hyder*, 42 L. J. Ch. 626; see *Arnold v. Enis*, 2 Ir. Ch. 601. which cannot be converted.

4. In *Gibson v. Bott*, 7 Ves. 89, the tenant for life was allowed interest from the death on the value at the death of leaseholds which could not be sold on account of a flaw in the title. See note, 1 Y. & C. C. 320.

5. Where personalty is directed to be laid out in land the tenant for life is entitled to the income from the testator's death. *Macpherson v. Macpherson*, 1 Macq. 243. Personalty to be laid out in land.

Where accumulation is directed till investment, one year is allowed. *Sitwell v. Barnard*, 6 Ves. 520.

6. Reversionary property must be sold under trusts for conversion and if the testator gives his trustees a discretion as to the period of conversion, interest will be allowed upon the value of the reversion at the end of a year from the death. *Wilkinson v. Duncan*, 23 B. 469; *Johnson v. Routh*, 3 Jur. N. S. 1041; 27 L. J. Ch. 305; *Countess of Harrington v. Atherton*, 3 D. J. & S. 352. Reversionary property must be sold.

If the reversion falls in before it is sold the tenant for life is entitled to interest at 4 per cent. from the death upon the value of the reversion at the end of a year from the death, on the assumption that it was to fall in when it actually did fall in. *Wilkinson v. Duncan*, 23 B. 469; *Wright v. Lambert*, 6 Ch. D. 649.

7. The tenant for life is entitled to the income of a fund set apart to pay contingent legacies. *Crawley v. Fullerton v. Martin*, 1 Dr. & Sm. 31; *Cranley v. Dixon*, 23 B. 513; *Allhusen v. Whittell*, 4 Eq. 295. Income of fund to pay contingent legacies goes to tenant for life.

Apportion-  
ment of  
recovered  
assets.

8. With regard to assets recovered after the testator's death, the tenant for life is entitled to the difference between the sum recovered and the sum which, if invested at 4 per cent. at the testator's death, would have amounted to the sum recovered. *Cox v. Cox*, 8 Eq. 343; *Ackroyd v. Ackroyd*, 18 Eq. 313; *In re Tinkler's Estate*, 20 Eq. 456; see *Maclaren v. Stainton*, 4 Eq. 448; 11 Eq. 382.

Leaseholds  
converted  
under com-  
pulsory  
powers.

9. When the tenant for life is entitled to the specific enjoyment of leaseholds which are converted under compulsory powers, he will be entitled to the same income as before and if he survives the period when the lease would have determined, he is absolutely entitled to the purchase money. *Jeffreys v. Conner*, 28 B. 328; *In re Beaufoy's Estate*, 1 Sm. & G. 20; *In re Money's Trusts*, 2 Dr. & S. 94; see *Phillips v. Sargent*, 7 Ha. 33.

Title to  
fund for  
renewal  
where re-  
newal has  
become im-  
possible.

10. In the case of renewable leaseholds where the testator has directed the creation of a fund for renewal out of the rents and the power of renewal is subsequently destroyed, the remainderman will be entitled to the fund for renewal if the object of the testator was to keep the leaseholds perpetually renewed at any cost. *In re Wood's Estate*, 10 Eq. 572; *Hollier v. Burne*, 16 Eq. 163; *Maddy v. Hale*, 3 Ch. D. 327.

If renewal has become impossible through the act of the testator, the trust is at an end. *Penfold v. Shillingford*, 46 L. J. Ch. 491.

11. On the other hand, if only a reasonable sum is to be applied in renewals, the tenant for life will be entitled to the whole fund. *Morris v. Hodges*, 27 B. 625; *In re Money's Trusts*, 2 Dr. & S. 94; 10 W. R. 399; see *Hayward v. Pile*, 5 Ch. 215.

Apportion-  
ment of  
costs of  
renewal.

12. When renewable leaseholds are given to several persons in succession without any direction as to how the cost of renewal is to be borne, the rules are:—



a. If the tenant for life gets no advantage from the renewal, the sum to be paid by the remainderman is the sum actually paid with compound interest at 4 per cent. down to the death of the tenant for life and simple interest afterwards. *Nightingale v. Lawson*, 1 B. C. C. 440; *White v. White*, 9 Ves. 557; *Giddings v. Giddings*, 3 Russ. 260.

b. If the tenant for life lives to enjoy the benefit of the renewal, the remainderman has to pay a sum bearing the same proportion to the whole sum paid as the benefit he gets from the renewal bears to the whole of the renewed lease with interest as before; cases *supra*.

c. In the case of renewable leaseholds for lives the same principles apply, the value of the lives being calculated at the time of the renewal according to the tables framed for the purpose; the chance that the new life may fail during the subsistence of the other *cestuis que vie* being apparently thrown upon the remainderman. *Jones v. Jones*, 5 Ha. 440; *Harris v. Harris*, 32 B. 333; *Bradford v. Brownjohn*, 3 Ch. 711.

13. Where the tenant for life buys the reversion of leaseholds devised in strict settlement, there being no trust to renew, he is entitled to a charge for the purchase money.

If the fee is conveyed on the trusts of the will the first tenant in tail who would have been absolutely entitled to the leaseholds is entitled to an interest equivalent to the residue of the term which would have been left at the death of the tenant for life.

If the fee is conveyed to the tenant for life, the first tenant in tail is absolutely entitled. *Isaac v. Wall*, 6 Ch. D. 706.

## CHAPTER L.

## SUGGESTIONS FOR PREPARING WILLS.

THE possible dispositions of property by testators are so infinitely various that general suggestions can be of very little use. The following points have however been selected as likely to be of frequent occurrence :—

1. With regard to payment of debts, if land is to be applied in exoneration of the personalty an express direction to that effect should be inserted.

2. The testator should consider whether mortgages are to be borne by the devisee or to be discharged out of the general personal estate. In the latter case a declaration to that effect should be inserted.

3. In the case of bequests to charities not empowered to take land by devise, proper directions as to payment out of pure personalty should be inserted.

4. In the description of the subject-matter of the testator's bounty language generally intelligible should be used. Thus terms of art, symbols, terms derived from local custom and so on should be avoided.

5. Things should be described by their permanent and not by their changeable characteristics; for instance, description of land by occupation should be avoided.

6. In the case of specific bequests care should be taken to ascertain the exact title of the stock or other security which is the subject of the bequest and the testator should be reminded of the liability of specific gifts to ademption by change of security or sale.

7. Inquiry should be made whether annuities given by the will are intended to be for the lives of the annuitants only or perpetual.

8. Residuary gifts should be expressed in the most general terms and enumeration of particular things should be avoided.

9. When a residue is given to several persons in succession, the testator should consider whether the tenant for life is intended to enjoy the property in the state in which it may be found at the testator's death or whether it is to be converted.

10. In the description of persons the same general caution applies as in the description of things.

11. If the gift is to a husband and wife with others, care should be taken to secure that the wife should take a separate share.

12. In the case of gifts to several persons or to classes words of severance should be introduced unless a joint tenancy is intended.

13. If illegitimate children are to be provided for, the fact that illegitimate children are intended should be unmistakeably expressed.

14. In the case of bequests to children, where it is possible that children may be born after the period of distribution has arrived, the testator should consider whether he wishes all the children to be included, and, in the latter event, clear words to that effect should be introduced.

15. In the case of gifts to several classes of persons or to different generations of issue, if the distribution is intended to be per stirpes there should be words to that effect.

16. It will as a rule be found advisable to avoid such vague terms as relations or family.

17. In gifts of personalty, words whether of purchase or limitation appropriate to realty should be avoided, and the same applies *mutatis mutandis* to devises.

18. In the case of gifts to a parent and children, or to a parent and issue, care should be taken to show whether the children or issue were intended to take concurrently with their parent or not.

19. The difficulties arising upon the rule in *Shelley's case* are too familiar to need comment. 335

20. The testator should be careful to distinguish between a recommendation and an obligation intended to be imposed on a legatee and in cases where he merely desires to express a wish there should be an express declaration that no trust is intended.

21. Clear directions should be inserted with regard to vesting in cases where bequests are intended to be contingent upon the attainment of a given age and care should be taken to bring clearly before the testator's mind the distinction between payment and vesting.

22. In the case of conditions imposed upon legatees there should be a gift over in the event of a clear and definite breach and care must be taken that the breach should accurately correspond with the condition. Testators should, however, be warned that to impose any but the simplest conditions upon legatees is as a rule an invitation to litigation.

23. Care should be taken that the dispositions of the testator do not infringe the rule against perpetuity and that there is no trust for accumulation beyond the limits allowed by statute.

24. In substitutional gifts to children inquiry should be made whether any persons satisfying the description of the members of the original class are dead at the date of the will leaving children and provision should be made accordingly.

25. In survivorship clauses, it should be clearly indicated to what period survivorship is to be referred, and whether survivorship is contemplated between individuals or between stirpes.

## APPENDIX.

### 1 VIC. CAP. XXVI.

#### AN ACT FOR THE AMENDMENT OF THE LAWS WITH RESPECT TO WILLS. [3RD JULY, 1837.]

BE it enacted by the Queen's most Excellent Majesty, by and with the Advice and Consent of the Lords Spiritual and Temporal, and Commons, in this present Parliament assembled, and by the Authority of the same, That the Words and Expressions hereinafter mentioned, which in their ordinary Signification have a more confined or a different Meaning, shall in this Act, except where the Nature of the Provision or the Context of the Act shall exclude such Construction, be interpreted as follows: (that is to say,) the Word "Will" shall extend to a Testament, and to a Codicil, and to an Appointment by Will or by Writing in the Nature of a Will in exercise of a Power, and also to a Disposition by Will and Testament or Devise of the Custody and Tuition of any Child, by virtue of an Act passed in the Twelfth Year of the Reign of King *Charles the Second*, intituled *An Act for taking away the Court of Wards and Liveries, and Tenures in capite and by Knights Service, and Purveyance, and for settling a Revenue upon His Majesty in lieu thereof*, or by virtue of an Act passed in the Parliament of *Ireland* in the Fourteenth and Fifteenth Years of the Reign of King *Charles the Second*, intituled *An Act for taking away the Court of Wards and Liveries, and Tenures in capite and by Knights Service*, and to any other Testamentary Disposition; and the Words "Real Estate" shall extend to Manors, Advowsons, Messuages, Lands, Tithes, Rents, and Hereditaments, whether Freehold, Customary Freehold, Tenant Right, Customary or Copyhold, or of any other Tenure, and whether corporeal, incorporeal, or personal, and to any undivided Share thereof, and to any Estate, Right, or Interest (other than a Chattel Interest) therein; and the Words "Personal Estate" shall extend to Leasehold Estates and other Chattels Real, and also to Monies, Shares of Government and other Funds, Securities for Money (not being Real Estates), Debts, Choses in Action, Rights, Credits, Goods, and all other Property whatsoever which by Law devolves upon the Executor or Administrator, and to any Share or Interest therein; and every Word importing the Singular Number only shall extend and be applied to several Persons or Things as well as One Person or Thing; and every Word importing the Masculine Gender only shall extend and be applied to a Female as well as a Male.

Meaning of certain words in this Act:

"Will:"

12 Car. 2, c. 24.

14 & 15 Car. 2 (1.).

"Real Estate:"

"Personal Estate:"

Number:

Gender

Repeal of  
the Statutes  
of Wills, 82  
Hen. 8, c. 1,  
and 34 & 35  
Hen. 8, c. 5.

10 Car. 1,  
Sess. 2, c. 2,  
(I.)

Secs. 5, 6,  
12, 19, 20,  
21, and 22 of  
the Statute  
of Frauds,  
29 Car. 2,  
c. 8; 7 Will.  
3, c. 12 (I.).

Sec. 14 of  
4 & 5 Anne,  
c. 16.

6 Anne  
c. 10 (I.).

Sec. 9 of  
14 Geo. 2,  
c. 20.

25 Geo. 2,  
c. 0 (except  
as to Colo-  
nies).

26 Geo. 2,  
c. 11 (I.).

55 Geo. 3,  
c. 192.

All prop-  
erty may  
be disposed  
of by Will,

II. And be it further enacted, That an Act passed in the Thirty-second Year of the Reign of King Henry the Eighth, intituled *The Act of Wills, Wards, and Primer Seisins, whereby a Man may devise Two Parts of his Land*; and also an Act passed in the Thirty-fourth and Thirty-fifth Years of the Reign of the said King Henry the Eighth, intituled *The Bill concerning the Explanation of Wills*; and also an Act passed in the Parliament of Ireland, in the Tenth Year of the Reign of King Charles the First, intituled *An Act how Lands, Tenements, etc. may be disposed by Will or otherwise, and concerning Wards and Primer Seisins*; and also so much of an Act passed in the Twenty-ninth Year of the Reign of King Charles the Second, intituled *An Act for Prevention of Frauds and Perjuries*, and of an Act passed in the Parliament of Ireland in the Seventh Year of the Reign of King William the Third, intituled *An Act for Prevention of Frauds and Perjuries*, as relates to Devises or Bequests of Lands or Tenements, or to the Revocation or Alteration of any Devise in Writing of any Lands, Tenements, or Hereditaments, or any Clause thereof, or to the Devise of any Estate *pur autre vie*, or to any such Estate being Assets, or to Nuncupative Wills, or to the repeal, altering, or changing of any Will in Writing concerning any Goods or Chattels or Personal Estate, or any Clause, Devise, or Bequest therein; and also so much of an Act passed in the Fourth and Fifth Years of the Reign of Queen Anne, intituled *An Act for the Amendment of the Law and the better Advancement of Justice*, and of an Act passed in the Parliament of Ireland in the Sixth Year of the Reign of Queen Anne, intituled *An Act for the Amendment of the Law and the better Advancement of Justice*, as relates to Witnesses to Nuncupative Wills; and also so much of an Act passed in the Fourteenth Year of the Reign of King George the Second, intituled *An Act to Amend the Law concerning Common Recoveries, and to explain and amend an Act made in the Twenty-ninth Year of the Reign of King Charles the Second, intituled 'An Act for Prevention of Frauds and Perjuries'*, as relates to Estates *pur autre vie*; and also an Act passed in the Twenty-fifth Year of the Reign of King George the Second, intituled *An Act for avoiding and putting an end to certain Doubts and Questions relating to the Attestation of Wills and Codicils concerning Real Estates in that Part of Great Britain called England, and in His Majesty's Colonies and Plantations in America*, except so far as relates to His Majesty's Colonies and Plantations in America; and also an Act passed in the Parliament of Ireland in the same Twenty-fifth Year of the Reign of King George the Second, intituled *An Act for the avoiding and putting an end to certain Doubts and Questions relating to the Attestations of Wills and Codicils concerning Real Estates*; and also an Act passed in the Fifty-fifth Year of the Reign of King George the Third, intituled *An Act to remove certain Difficulties in the Disposition of Copyhold Estates by Will*, shall be and the same are hereby repealed, except so far as the same Acts or any of them respectively relate to any Wills or Estates *pur autre vie* to which this Act does not extend.

III. And be it further enacted, That it shall be lawful for every Person to devise, bequeath, or dispose of, by his Will executed in manner hereinafter required, all Real Estate and all Personal Estate which he shall be entitled to, either at Law or in Equity, at the Time of his Death, and which, if not so devised, bequeathed, or disposed of would devolve upon the Heir at Law, or Customary Heir of him, or, if he became entitled by Descent, of his Ancestor, or upon his

Executor or Administrator; and that the power hereby given shall extend to all Real Estate of the Nature of Customary Freehold or Tenant Right, or Customary or Copyhold, notwithstanding that the Testator may not have surrendered the same to the Use of his Will, or notwithstanding that, being entitled as Heir, Devisee, or otherwise to be admitted thereto, he shall not have been admitted thereto, or notwithstanding that the same, in consequence of the want of a Custom to devise or surrender to the Use of a Will or otherwise, could not at Law have been disposed of by Will if this Act had not been made, or notwithstanding that the same, in consequence of there being a Custom that a Will or a Surrender to the Use of a Will should continue in force for a limited Time only, or any other special Custom, could not have been disposed of by Will according to the Power contained in this Act, if this Act had not been made: and also to Estates *pur autre vie*, whether there shall or shall not be any special Occupant thereof, and whether the same shall be Freehold, Customary Freehold, Tenant Right, Customary or Copyhold, or of any other Tenure, and whether the same shall be a corporeal or an incorporeal Hereditament; and also to all contingent, executory, or other future Interests in any Real or Personal Estate, whether the Testator may or may not be ascertained as the Person or one of the Persons in whom the same respectively may become vested, and whether he may be entitled thereto under the Instrument by which the same respectively were created or under any Disposition thereof by Deed or Will; and also to all Rights of Entry for Conditions broken, and other Rights of Entry; and also to such of the same Estates, Interests, and Rights respectively, and other Real and Personal Estate, as the Testator may be entitled to at the time of his Death, notwithstanding that he may become entitled to the same subsequently to the Execution of his Will.

comprising Customary Freeholds and Copyholds without Surrender, and before Admittance, and also such of them as cannot now be devised;

Estates *pur autre vie*;

contingent Interests;

Rights of Entry; and Property acquired after Execution of the Will.

IV. Provided always, and be it further enacted, That where any Real Estate of the Nature of Customary Freehold or Tenant Right, or Customary or Copyhold, might, by the Custom of the Manor of which the same is holden, have been surrendered to the Use of a Will, and the Testator shall not have surrendered the same to the Use of his Will, no Person entitled or claiming to be entitled thereto by virtue of such Will shall be entitled to be admitted, except upon Payment of all such Stamp Duties, Fees, and sums of money as would have been lawfully due and payable in respect of the surrendering of such Real Estate to the Use of the Will, or in respect of presenting, registering, or enrolling such Surrender, if the same Real Estate had been surrendered to the Use of the Will of such Testator: Provided also, that where the Testator was entitled to have been admitted to such Real Estate, and might, if he had been admitted thereto, have surrendered the same to the Use of his Will, and shall not have been admitted thereto, no person entitled or claiming to be entitled to such Real Estate in consequence of such Will shall be entitled to be admitted to the same Real Estate by virtue thereof, except on Payment of all such Stamp Duties, Fees, Fines, and Sums of Money as would have been lawfully due and payable in respect of the Admittance of such Testator to such Real Estate, and also of all such Stamp Duties, Fees, and Sums of Money as would have been lawfully due and payable in respect of surrendering such Real Estate to the Use of the Will, or of presenting, registering, or enrolling such Surrender, had the Testator been duly admitted to such Real Estate, and after-

As to the Fees and Fines payable by Devisees of Customary and Copyhold Estates.

wards surrendered the same to the Use of his Will; all which Stamp Duties, Fees, Fine, or Sums of Money due as aforesaid shall be paid in addition to the Stamp Duties, Fees, Fine, or Sums of Money due or payable on the Admittance of such Person so entitled or claiming to be entitled to the same Real Estate as aforesaid.

Wills or  
Extracts of  
Wills of  
Customary  
Freeholds  
and Copy-  
holds to be  
entered on  
the Court  
Rolls;

and the  
Lord to be  
entitled to  
the same  
Fine, &c.,  
when such  
Estates are  
not now de-  
visable, as  
he would  
have been  
from the  
Heir in case  
of Descent.  
*Estates pur  
autre vic.*

V. And be it further enacted, That when any Real Estate of the Nature of Customary Freehold or Tenant Right, or Customary or Copyhold, shall be disposed of by Will, the Lord of the Manor or reputed Manor of which such Real Estate is holden, or his Steward, or the Deputy of such Steward, shall cause the Will by which such Disposition shall be made, or so much thereof as shall contain the Disposition of such Real Estate, to be entered on the Court Rolls of such Manor or reputed Manor; and when any Trusts are declared by the Will of such Real Estate, it shall not be necessary to enter the Declaration of such Trusts, but it shall be sufficient to state in the Entry on the Court Rolls that such Real Estate is subject to the Trusts declared by such Will; and when any such Real Estate could not have been disposed of by Will if this Act had not been made, the same Fine, Heriot, Dues, Duties, and Services shall be paid and rendered by the Devisee as would have been due from the Customary Heir in case of the Descent of the same Real Estate, and the Lord shall as against the Devisee of such Estate have the same Remedy for recovering and enforcing such Fine, Heriot, Dues, Duties, and Services as he is now entitled to for recovering and enforcing the same from or against the Customary Heir in case of a Descent.

VI. And be it further enacted, That if no Disposition by Will shall be made of any Estate *pur autre vie* of a Freehold Nature, the same shall be chargeable in the Hands of the Heir, if it shall come to him by reason of special Occupancy, as Assets by Descent, as in the Case of Freehold Land in Fee Simple; and in case there shall be no special Occupant of any Estate *pur autre vie*, whether Freehold or Customary Freehold, Tenant Right, Customary or Copyhold, or of any other Tenure, and whether a corporeal or incorporeal Hereditament, it shall go to the Executor or Administrator of the Party that had the Estate thereof by virtue of the Grant; and if the same shall come to the Executor or Administrator either by reason of a special Occupancy or by virtue of this Act, it shall be assets in his Hands, and shall go and be applied and distributed in the same Manner as the Personal Estate of the Testator or Intestate.

No Will of a  
Person  
under Age  
valid;

nor of a  
Feme Co-  
vert, except  
such as  
might now  
be made.

Every Will  
shall be in  
Writing, and  
signed by  
the Testa-  
tor in the  
Presence of  
Two Wit-  
nesses at  
one Time.  
Appoint-  
ments by

VII. And be it further enacted, That no Will made by any Person under the Age of Twenty-one Years shall be valid.

VIII. Provided also, and be it further enacted, That no Will made by any Married Woman shall be valid, except such a Will as might have been made by a Married Woman before the passing of this Act.

IX. And be it further enacted, That no Will shall be valid unless it shall be in writing, and executed in manner herein-after mentioned; (that is to say,) it shall be signed at the Foot or End thereof by the Testator, or by some other Person in his Presence and by his Direction; and such Signature shall be made or acknowledged by the Testator in the Presence of Two or more Witnesses present at the same Time, and such Witnesses shall attest and shall subscribe the Will in the Presence of the Testator, but no Form of Attestation shall be necessary.

X. And be it further enacted, That no Appointment made by Will,



in exercise of any Power, shall be valid, unless the same be executed in manner herein-before required; and every Will executed in manner herein-before required shall, so far as respects the Execution and Attestation thereof, be a valid Execution of a Power of Appointment by Will, notwithstanding it shall have been expressly required that a Will made in exercise of such Power should be executed with some additional or other Form of Execution or Solemnity.

Will to be executed like other Wills, and to be valid, although other required Solemnities are not observed.

XI. Provided always, and be it further enacted, That any Soldier being in actual Military Service, or any Mariner or Seaman being at Sea, may dispose of his Personal Estate as he might have done before the making of this Act.

Soldiers' and Mariners' Wills excepted.

XII. And be it further enacted, That this Act shall not prejudice or affect any of the Provisions contained in an Act passed in the Eleventh Year of the Reign of His Majesty King *George* the Fourth and the First Year of the Reign of His late Majesty King *William* the Fourth, intituled *An Act to amend and consolidate the Laws relating to the Pay of the Royal Navy*, respecting the Wills of Petty Officers and Seamen in the Royal Navy, and Non-commissioned Officers of Marines, and Marines, so far as relates to their Wages, Pay, Prize Money, Bounty Money, and Allowances, or other Monies payable in respect of Services in Her Majesty's Navy.

Act not to affect certain Provisions of 11 Geo. 4 & 1 Will. 4, c. 20, with respect to Wills of Petty Officers and Seamen and Marines.

XIII. And be it further enacted, That every Will executed in manner herein-before required shall be valid without any other Publication thereof.

Publication not to be requisite.

XIV. And be it further enacted, That if any Person who shall attest the Execution of a Will shall at the Time of the Execution thereof or at any Time afterwards be incompetent to be admitted a Witness to prove the Execution thereof, such Will shall not on that Account be invalid.

Will not to be void on account of incompetency of attesting Witness.

XV. And be it further enacted, That if any Person shall attest the Execution of any Will to whom or to whose Wife or Husband any beneficial Devise, Legacy, Estate, Interest, Gift, or Appointment, of or affecting any Real or Personal Estate (other than and except Charges and Directions for the Payment of any Debt or Debts), shall be thereby given or made, such Devise, Legacy, Estate, Interest, Gift, or Appointment shall, so far only as concerns such Person attesting the Execution of such Will, or the Wife or Husband of such Person, or any Person claiming under such Person or Wife or Husband, be utterly null and void, and such Person so attesting shall be admitted as a Witness to prove the Execution of such Will, or to prove the Validity or Invalidity thereof, notwithstanding such Devise, Legacy, Estate, Interest, Gift, or Appointment mentioned in such Will.

Gifts to an attesting Witness to be void.

XVI. And be it further enacted, That in case by any Will any Real or Personal Estate shall be charged with any Debt or Debts, and any Creditor, or the Wife or Husband of any Creditor, whose Debt is so charged, shall attest the Execution of such Will, such Creditor notwithstanding such Charge shall be admitted a Witness to prove the Execution of such Will, or to prove the Validity or Invalidity thereof.

Creditor attesting to be admitted a Witness.

XVII. And be it further enacted, That no Person shall, on account of his being an Executor of a Will, be incompetent to be admitted a Witness to prove the Execution of such Will, or a Witness to prove the Validity or Invalidity thereof.

Executor to be admitted a witness.

XVIII. And be it further enacted, That every Will made by a Man Will to be

revoked by Marriage.

or Woman shall be revoked by his or her Marriage (except a Will made in exercise of a Power of Appointment, when the Real or Personal Estate thereby appointed would not in default of such Appointment pass to his or her Heir, Customary Heir, Executor, or Administrator, or the Person entitled as his or her next of Kin, under the Statute of Distributions).

No Will to be revoked by Presumption.

XIX. And be it further enacted, That no Will shall be revoked by any Presumption of an Intention on the Ground of an Alteration in Circumstances.

No Will to be revoked but by another Will or Codicil, or by a Writing executed like a Will, or by Destruction.

XX. And be it further enacted, That no Will or Codicil, or any Part thereof, shall be revoked otherwise than as aforesaid, or by another Will or Codicil executed in manner herein-before required, or by some Writing declaring an Intention to revoke the same, and executed in the Manner in which a Will is herein-before required to be executed, or by the burning, tearing, or otherwise destroying the same by the Testator, or by some Person in his Presence and by his Direction, with the intention of revoking the same.

No Alteration in a Will shall have any Effect unless executed as a Will.

XXI. And be it further enacted, That no Obliteration, Interlineation, or other Alteration made in any Will after the Execution thereof shall be valid or have any Effect, except so far as the Words or Effect of the Will before such Alteration shall not be apparent, unless such Alteration shall be executed in like Manner as herein-before is required for the Execution of the Will; but the Will, with such Alteration as Part thereof, shall be deemed to be duly executed if the Signature of the Testator and the Subscription of the Witnesses be made in the Margin or on some other Part of the Will opposite or near to such Alteration, or at the Foot or End of or opposite to a Memorandum referring to such Alteration, and written at the End or some other Part of the Will.

No Will revoked to be revived otherwise than by Re-execution or a Codicil to revive it.

XXII. And be it further enacted, That no Will or Codicil, or any Part thereof, which shall be in any Manner revoked, shall be revived otherwise than by the Re-execution thereof, or by a Codicil executed in manner herein-before required, and showing an Intention to revive the same; and when any Will or Codicil which shall be partly revoked, and afterwards wholly revoked, shall be revived, such Revival shall not extend to so much thereof as shall have been revoked before the Revocation of the whole thereof, unless an Intention to the contrary shall be shown.

A Devise not to be rendered inoperative by any subsequent Conveyance or Act.

XXIII. And be it further enacted, That no Conveyance or other Act made or done subsequently to the Execution of a Will of or relating to any Real or Personal Estate therein comprised, except an Act by which such Will shall be revoked as aforesaid, shall prevent the Operation of the Will with respect to such Estate or Interest in such Real or Personal Estate as the Testator shall have power to dispose of by Will at the Time of his Death.

A Will shall be construed to speak from the Death of the Testator

XXIV. And be it further enacted, That every Will shall be construed, with reference to the Real Estate and Personal Estate comprised in it, to speak and take effect as if it had been executed immediately before the Death of the Testator, unless a contrary Intention shall appear by the Will.

A Residuary Devise shall include Estates comprised in lapsed and

XXV. And be it further enacted, That, unless a contrary Intention shall appear by the Will, such Real Estate or Interest therein as shall be comprised or intended to be comprised in any Devise in such Will contained, which shall fail or be void by reason of the Death of the Devisee in the Lifetime of the Testator, or by reason of such Devise

being contrary to Law or otherwise incapable of taking effect, shall be included in the Residuary Devise (if any) contained in such Will.

void De-  
vices.

XXVI. And be it further enacted, That a Devise of the Land of the Testator, or of the Land of the Testator in any Place or in the Occupation of any Person mentioned in his Will, or otherwise described in a general Manner, and any other general Devise which would describe a Customary, Copyhold, or Leasehold Estate if the Testator had no Freehold Estate which could be described by it, shall be construed to include the Customary, Copyhold, and Leasehold Estates of the Testator, or his Customary, Copyhold, and Leasehold Estates, or any of them, to which such Description shall extend, as the Case may be, as well as Freehold Estates, unless a contrary Intention shall appear by the Will.

A general Devise of the Testator's Lands shall include Copyhold and Leasehold as well as Freehold Lands.

XXVII. And be it further enacted, That a general Devise of the Real Estate of the Testator, or of the Real Estate of the Testator in any Place or in the Occupation of any Person mentioned in his Will, or otherwise described in a general Manner, shall be construed to include any Real Estate, or any Real Estate to which such Description shall extend (as the case may be), which he may have Power to appoint in any manner he may think proper, and shall operate as an Execution of such Power, unless a contrary intention shall appear by the Will; and in like Manner a Bequest of the Personal Estate of the Testator, or any Bequest of Personal Property described in a general Manner, shall be construed to include any Personal Estate, or any Personal Estate to which such Description shall extend (as the Case may be), which he may have Power to appoint in any Manner he may think proper, and shall operate as an Execution of such Power, unless a contrary intention shall appear by the Will.

A general Gift shall include Estates over which the Testator has a general Power of Appointment.

XXVIII. And be it further enacted, That where any Real Estate shall be devised to any Person without any words of Limitation, such Devise shall be construed to pass the Fee Simple, or other the whole Estate or Interest which the Testator had Power to dispose of by Will in such Real Estate, unless a contrary Intention shall appear by the Will.

A Devise without any Words of Limitation shall be construed to pass the Fee.

XXIX. And be it further enacted, That in any Devise or Bequest of Real or Personal Estate the Words "die without Issue," or "die without leaving Issue," or "have no Issue," or any other Words which may import either a Want or Failure of Issue of any Person in his Lifetime, or at the Time of his Death, or an indefinite Failure of his Issue, shall be construed to mean a Want or Failure of Issue in the Lifetime or at the Time of the Death of such Person, and not an indefinite Failure of his Issue, unless a contrary Intention shall appear by the Will, by reason of such Person having a Prior Estate Tail or of a preceding Gift, being (without any Implication arising from such Words), a Limitation of an Estate Tail to such Person or Issue, or otherwise: Provided, that this Act shall not extend to Cases where such Words as aforesaid import if no Issue described in a preceding Gift shall be born, or if there shall be no Issue who shall live to attain the Age or otherwise answer the Description required for obtaining a vested Estate by a preceding Gift to such Issue.

The Words "die without Issue," or "die without leaving Issue," shall be construed to mean die without Issue living at the Death.

XXX. And be it further enacted, that where any Real Estate (other than or not being a Presentation to a Church) shall be devised to any Trustee or Executor, such devise shall be construed to pass the Fee Simple or other the whole Estate or Interest which the Testator had power to dispose of by Will in such Real Estate, unless

No Devise to Trustees or Executors, except for a Term or a Presentation to a

Church,  
shall pass a  
Chattel  
Interest.  
Trustees  
under an  
unlimited  
Devise,  
where the  
Trust may  
endure be-  
yond the  
Life of a  
Person  
beneficially  
entitled for  
Life, to take  
the Fee.  
Devise of  
Estates Tail  
shall not  
lapse.

Gifts to  
Children or  
other Issue  
who leave  
Issue living  
at the  
Testator's  
Death shall  
not lapse.

Act not to  
extend to  
Wills made  
before 1838,  
nor to  
Estates *pur  
autre vie* of  
Persons who  
die before  
1838.

Act not to  
extend to  
Scotland.

Act may be  
altered this  
Session.

a definite Term of Years, absolute or determinable, or an Estate of Freehold, shall thereby be given to him expressly or by Implication.

XXXI. And be it further enacted, That where any Real Estate shall be devised to a Trustee, without any express Limitation of the Estate to be taken by such Trustee, and the beneficial Interest in such Real Estate, or in the surplus Rents and Profits thereof, shall not be given to any Person for Life, or such beneficial Interest shall be given to any Person for Life, but the Purposes of the Trust may continue beyond the Life of such Person, such Devise shall be construed to vest in such Trustee the Fee Simple, or other the whole legal Estate which the Testator had Power to dispose of by Will in such Real Estate, and not an Estate determinable when the Purposes of the Trust shall be satisfied.

XXXII. And be it further enacted, That where any Person to whom any Real Estate shall be devised for an Estate Tail or an Estate in quasi Entail shall die in the lifetime of the Testator leaving Issue who would be inheritable under such Entail, and any such Issue shall be living at the Time of the Death of the Testator, such Devise shall not lapse, but shall take effect as if the Death of such Person had happened immediately after the Death of the Testator, unless a contrary Intention shall appear by the Will.

XXXIII. And be it further enacted, That where any Person being a Child or other Issue of the Testator to whom any Real or Personal Estate shall be devised or bequeathed for any Estate or Interest not determinable at or before the Death of such Person shall die in the Lifetime of the Testator leaving Issue, and any such Issue of such Person shall be living at the Time of the Death of the Testator, such Devise or Bequest shall not lapse, but shall take effect as if the Death of such Person had happened immediately after the Death of the Testator, unless a contrary Intention shall appear by the Will.

XXXIV. And be it further enacted, That this Act shall not extend to any Will made before the First Day of *January* One thousand eight hundred and thirty-eight, and that every Will re-executed or republished, or revived by any Codicil, shall for the Purposes of this Act be deemed to have been made at the Time at which the same shall be so re-executed, republished, or revived; and that this Act shall not extend to any Estate *pur autre vie* of any Person who shall die before the First Day of *January*, One thousand eight hundred and thirty-eight.

XXXV. And be it further enacted, That this Act shall not extend to *Scotland*.

XXXVI. And be it enacted, That this Act may be amended, altered, or repealed by any Act or Acts to be passed in this present Session of Parliament.

# DUTIES ON PROBATES OF WILLS AND LETTERS OF ADMINISTRATION UNDER THE CUSTOMS OF INLAND REVENUE ACT, 1881.

(As passed by the House of Commons, May 30, 1881.)

Where the estate and effects for or in  
respect of which the probate or letters  
of administration is or are to be granted  
exclusive of trust property is above  
£100 and not above £500 . . . . .

At the rate of £1 for every  
£50, and for any fractional  
part of £50 over any multiple  
of £50.

Where the estate and effects shall be  
above £500 and not above £1000 . . . . .

At the rate of £1 5s. for  
every £50, and for any frac-  
tional part of £50 over any  
multiple of £50.

Where the estate and effects shall  
be above £1000 . . . . .

At the rate of £3 for every  
£100, and for any fractional  
part of £100 over any multiple  
of £100.

By section 28, for the purposes of the duty a deduction is allowed of funeral expenses and debts, not including voluntary debts, expressed to be payable on the death of the deceased, or payable under any instrument which shall not have been *bond fide* delivered to the donee thereof three months before the death of the deceased, and debts in respect whereof any real estate may be primarily liable or a reimbursement may be capable of being claimed from any real estate of the deceased or from any other estate or person.

The funeral expenses to be deducted must be reasonable funeral expenses according to law.

By section 33, where the whole personal estate and effects of any person dying after the 1st June, 1881 (inclusive of property by law made such personal estate and effects for the purpose of the charge of duty, and any personal estate and effects situate out of the United Kingdom), without any deduction for debts or funeral expenses, shall not exceed £300, the person applying for probate or letters of administration may deliver a notice setting forth the particulars of the estate and effects, and deposit the sum of 15 shillings for fees of Court and expenses; and also, in case the estate exceeds £100, the further sum of 30 shillings for stamp duty.

By section 36, the payment of the sum of 30 shillings under section 33 is to be in full satisfaction of any claim to legacy duty or succession duty.

By section 41, any legacy, residue or share of residue, payable out of or consisting of any estate or effects according to the value whereof duty has been paid under the Act, is relieved from the 1 per cent. duty imposed by 55 Geo. III. c. 184. And in respect of any succession to property according to the value whereof duty has been paid under the Act, the duty of 1 per cent. imposed by the Succession Duty Act, 1853, is not payable.

By section 42, legacy duty is payable on legacies under £20, unless the whole estate is less than £100, when no legacy duty is payable on any part of the estate.

## STAMP DUTIES (PROBATES, LEGACIES, AND SUCCESSION).

TABLES for Calculating the LEGACY AND SUCCESSION DUTIES  
from £100 to £1 (a).

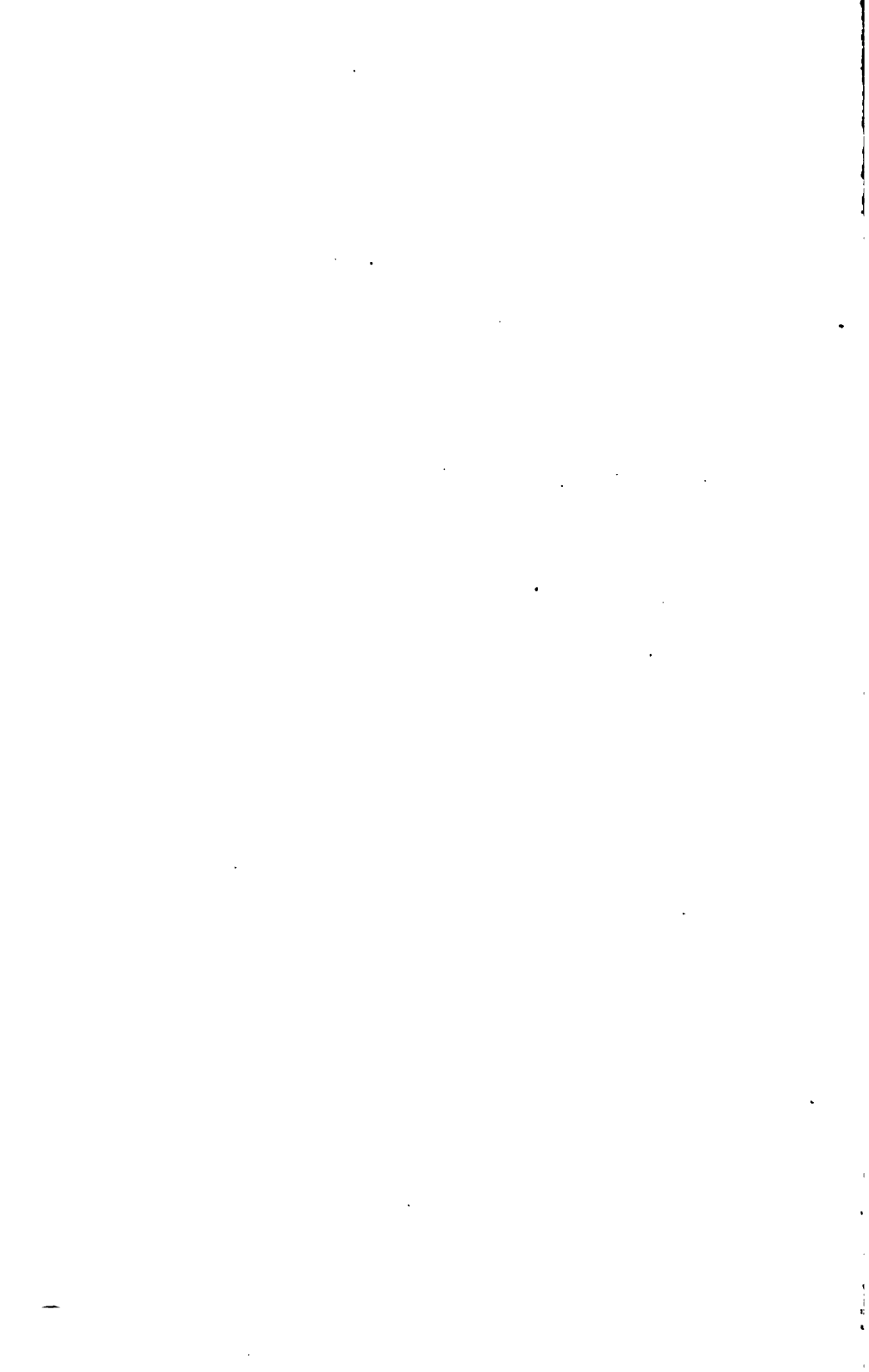
	£10			£6			£5			£3			£1 pr. ct.				£10			£6			£5			£3			£1 p. c.		
£	£	s.	d.	£	s.	d.	£	s.	d.	£	s.	d.	£	s.	d.	s.	s.	d.	s.	s.	d.	s.	s.	d.	£	s.	d.	£	s.	d.	
100	10	0	0	6	0	0	5	0	0	3	0	0	1	0	0	13	1	3½	9½	7½	4½	-	-	1½	13	1	3½	9½	7½	4½	
50	5	0	0	3	0	0	2	10	0	1	10	0	-	10	0	12	1	2½	8½	7	-	4½	-	-	1½	12	1	2½	8½	7	
25	2	10	0	1	10	0	1	5	0	-	15	0	-	5	0	11	1	1	-	7½	6½	-	3½	-	-	1½	11	1	1	-	7½
10	1	0	0	-	12	0	-	10	0	-	6	0	-	2	0	10	1	0	-	7	6	-	3½	-	-	1	10	1	0	-	7
5	-	10	0	-	6	0	-	5	0	-	3	0	-	1	0	9	-	10½	-	6½	5½	-	3	-	-	1	9	-	10½	-	6½
4	-	8	0	-	4	9½	-	4	0	-	2	4½	-	9½	-	8	-	9½	-	5½	4½	-	2½	-	-	¾	8	-	9½	-	5½
3	-	6	0	-	3	7	-	3	0	-	1	9½	-	7	-	7	-	8½	-	5	4	-	2½	-	-	¾	7	-	8½	-	5
2	-	4	0	-	2	4½	-	2	0	-	1	2½	-	4½	-	6	-	7	-	4½	3½	-	2	-	-	¾	6	-	7	-	4½
1	-	2	0	-	1	1½	-	1	0	-	-	7	-	2½	-	5	-	6	-	3½	3	-	1½	-	-	¾	5	-	6	-	3½
19s.	-	1	10½	-	1	1½	-	-	11½	-	-	6½	-	2½	-	4	-	4½	-	2½	2½	-	1½	-	-	¾	4	-	4½	-	2½
18	-	1	9½	-	1	0½	-	-	10½	-	-	6½	-	2	-	3	-	3½	-	2	1½	-	1	-	-	¾	3	-	3½	-	2
17	-	1	8½	-	1	0	-	-	10	-	-	6	-	2	-	2	-	2½	-	1½	1	-	-	-	-	¾	2	-	2½	-	1½
16	-	1	7	-	-	11½	-	-	9½	-	-	5½	-	1½	-	1	-	1	-	-	½	-	-	-	-	¾	1	-	1	-	-
15	-	1	6	-	-	10½	-	-	9	-	-	5½	-	1½	-	6d.	-	½	-	-	½	-	-	-	-	¾	6d.	-	½	-	-
14	-	1	4½	-	-	10	-	-	8½	-	-	5	-	1½	-	3	-	-	-	½	-	-	-	-	-	¾	3	-	-	-	-

## RATES of LEGACY AND SUCCESSION DUTIES.

(55 Geo. III. c. 184, and 16 &amp; 17 Vict. c. 51.)

Description of the Residuary Legatee, or next of Kin, to be in the following Words of the Act.	On Real or Personal Estate, if the Deceased died after the 5th April, 1865.
To Children of the deceased and their Descendants—or to the Father or Mother, or any lineal ancestor of the deceased.	£1 per cent.
To Brothers and Sisters of the deceased, and their Descendants.	3 "
To Brothers and Sisters of the Father or Mother of the deceased, or their Descendants.	5 "
To Brothers and Sisters of a Grandfather or Grandmother of the deceased, and their Descendants.	6 "
To any person in any other degree of collateral consanguinity—or to Strangers in blood to the deceased.	10 "
The Husband or Wife of any relative pays the same rate of duty as, that to which the relative would be liable, 16 & 17 Vict. c. 51, s. 11.	

(a) The duties on sums varying between those stated in the first five lines of the Table can, of course, be ascertained by adding the different proportions together, viz., £50, £10, £5, for £65—or by subtraction, as—for £95, £5 from £100.





A SUMMARY  
OF THE ALTERATIONS MADE IN THE  
LAW RELATING TO WILLS  
BY THE  
MARRIED WOMEN'S PROPERTY ACT, 1882,  
AND THE  
CONVEYANCING ACT, 1882,  
FORMING AN ADDENDUM TO  
THEOBALD'S TREATISE ON THE LAW OF WILLS.



## ADDENDA.

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THE testamentary power of married women has been enlarged by the Married Women's Property Act, 1882, and the statement of the law contained on pages 15—17 requires modification.

By that Act, which comes into force on the 1st January, 1883 (section 1), a married woman is capable of acquiring, holding, and disposing by will or otherwise of any real or personal property as her separate property in the same manner as if she were a *feme sole*, without the intervention of a trustee (section 1, subs. 1).

By section 2, every woman who marries after the commencement of the Act may hold as her separate property and dispose of in manner aforesaid all real and personal property which shall belong to her at the time of her marriage, or shall be acquired by or devolve upon her after marriage, including any wages, earnings, money, and property gained or acquired by her in any employment, trade or occupation in which she is engaged or which she carries on separately from her husband, or by the exercise of any literary, artistic or scientific skill.

By section 4, the execution of a general power by will by a married woman is to have the effect of making the property appointed liable for her debts and other liabilities in

the same manner as her separate estate is made liable under the Act (*see* p. 624, *post*).

Property  
acquired  
after Act  
by woman  
married  
before.

By section 5, every woman married before the commencement of the Act may hold and dispose of in manner aforesaid, as her separate property, all real and personal property, her title to which, whether vested or contingent and whether in possession, reversion, or remainder, shall accrue after the commencement of the Act, including wages, earnings, money, and property, so gained or acquired by her as aforesaid.

Married  
woman  
executrix  
or trustee.

By section 18, a married woman who is an executrix or administratrix alone or jointly with any other person, or a trustee alone or jointly as aforesaid, may sue and be sued and may transfer or join in transferring the trust property without her husband as if she were a *feme sole*.

Conveyan-  
cing Act,  
1882.

The effect of gifts over in default of issue has, as regards land, been modified by the Conveyancing Act, 1882 (*see* p. 534, *post*).

Restric-  
tion on  
executory  
limitation.

By section 10 of that Act, it is enacted that where there is a person entitled to land for an estate in fee, or for a term of years, absolute or determinable on life or for term of life, with a limitation over on default or failure of all or any of his issue, whether within or at any specified period or time, or not, that executory limitation shall be and become void and incapable of taking effect if and as soon as there is living any issue who has attained the age of twenty-one years of the class on default or failure whereof the limitation over was to take effect.

The section applies only, where the executory limitation is contained in an instrument coming into operation after the commencement of the Act (the 1st January, 1883).

# INDEX.

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## ABATEMENT,

of legacies, 620—622

what are legacies for purpose of, 620, 621

how the value of annuities calculated, 621

legacies for valuable consideration have priority, *ib.*

legacy in lieu of dower where testator has no land has no priority, *ib.*

legacy to wife to be paid at once, *ib.*

time of payment creates no priority, *ib.*, 622

use of words, "firstly," "secondly," in introducing legacies, 622

legacies on supposition of a surplus, *ib.*

realty given subject to legacies abates before them, *ib.*

between general and residuary legatees, 622—624

legacies have priority over residue, 622, 623

fund set apart to pay annuities, 623

direction that annuities are to abate, *ib.*

loss of assets falls on residue, *ib.*

consent by legatees to an appropriation, *ib.*, 624

## ABSOLUTE INTEREST IN PERSONALTY, 370—376

what passes an,

words of limitation to pass,

executors, 370

heirs, 371, 372

issue, 373, 374

gift of the income of property when it passes, 374, 375

power of disposition, when it gives, 375, 376

effect of subsequent restrictions upon, 377, 378

distinguished from a trust (see TRUST), 378—386

cannot be given in succession, 473

implication of (see IMPLICATION), 567—570

## ACCELERATION,

of power of leasing, 366

not effected by Thellusson Act, 447, 448

takes place where the tenant for life is incapable of taking, 609

by revocation or forfeiture, 610

distinction between powers of sale and of charging as regards, *ib.*

no distinction between devises and appointments as regards, *ib.*

intention not to accelerate gift in default of appointment, *ib.*

## ACCRUER, 516—518

effect of a clause of, upon vesting, 416

clause of, will not pass accrued shares, 516

intention that accrued are to go with original shares, 517

consolidation of original and accrued shares, *ib.*

words applicable to accrued shares, *ib.*

**ACCRUER**—*continued*.

- his or her share or shares, 517
- share and shares and interest, *ib.*
- where the fund is treated as entire at the period of distribution, *ib.*
- with benefit of survivorship, 517
- gift over of the whole fund, 518
- where the gift is residuary, *ib.*
- restrictions of original do not extend to accrued shares, *ib.*

**ACCUMULATION**, 443—449

- of rents from mines passes with surface, 154
- of past years when applicable to maintenance, 369
- trust for, during minorities of tenants in tail void, 432, 433
  - for payment of debts is valid, 433
  - till the fund reaches a certain sum when valid, *ib.*
- trust for, beyond limits of perpetuity is void, 443
- effect of the Thellusson Act, *ib.*
- property given so as to involve, is within the statute, *ib.*, 444
- owing to neglect of trustees to apply money at once is not, 444
- direction to keep up policies on the lives of children is not, *ib.*
- testator may select any one, but not more, of the periods allowed by the statute, *ib.*
- period of twenty-one years runs from the testator's death, *ib.*
- period of minority runs only from the birth of the minor, *ib.*
- whether allowable during minority of a person not born at the date of the will, *ib.*, 445
- beyond the limits of the statute is void *pro tanto*, 445
- for payment of debts is excepted from the statute, *ib.*
- the debts must be *bond fide* debts, *ib.*
- portions for children of testator or of a beneficiary under the will are excepted, *ib.*, 446
- what interest the parent must take, 446
- what portions are within the exception, *ib.*
- fund to be accumulated and given to children living when accumulation ceases, *ib.*
- fund to be accumulated and given to parent for life, and then to his children, *ib.*
- to pay portions charged by another instrument, *ib.*
- portions charged by the will are within the exception, *ib.*
- legatee having vested right may stop at twenty-one, 447
- whether the rule applies to charities, *ib.*
- interests in remainder not accelerated, *ib.*
- destination of excessive, *ib.*
- the statute does not accelerate any gifts in the will, 448
- forms part of capital of residue, *ib.*
- excessive, of residue goes to heir or next of kin, *ib.*
- income of, whether it forms part of capital of residue, *ib.*
- title to accumulated fund given over in certain events, *ib.*

**ACKNOWLEDGMENT**,

- of signature to will, 27—29
- of person as heir, effect of, 270

**ACREAGE**,

- description by, effect of, 97

**ADDITIONAL LEGACIES** (see **CUMULATIVE LEGACIES**), 114—118, 577**ADDITIONS**,

- made in will, rule as to, 32—34
- made in mistake as to fact, 577, 578

## ADEMPTION,

- by sale before date of will, 102
  - effect of subsequent repurchase, *ib.*, 103
  - confirmation by codicil, 103
- by subsequent dealings with property given by the will, 119—122
  - whether specific legacy must be subject to, 108
  - by the act of the testator, 119
  - by conversion through a properly constituted authority, *ib.*
  - by *vis major*, *ib.*
  - effect of a mere transfer to trustees, 120
    - a formal change, *ib.*
    - receipt by the testator of share under former will, *ib.*
    - a change of security, *ib.*
  - of fund subject to power, 121
  - effect of confirmation of will on adeemed legacy, *ib.*
    - the Wills Act, 102, 103
  - gift of a debt adeemed by receipt, 121
  - whether a fresh debt will pass, 121
  - of a gift of things in a house, 121 122
  - when removal is material, *ib.*
  - whether temporary removal will work, *ib.*
  - by change of interest, 122, 123
  - of lease by purchase of fee, 123
  - section 23 of the Wills Act does not apply to cases of, 575
  - See CONVERSION, 192—206
- of legacies by subsequent advances, 594—597
  - distinguished from satisfaction, 586, 587
  - testator must be in *loco parentis*, 595
  - advance of less amount adeems *pro tanto*, *ib.*
  - how the value of the advance is estimated, *ib.*
  - gift of residue may be adeemed, *ib.*
  - small advances for special purposes will not adeem, *ib.*
  - how the presumption of, is rebutted, *ib.*, 596
  - differences between legacy and advance, *ib.*
  - advance to a child will not adeem substitutional gift to issue, *ib.*
  - advance to husband for purposes of the marriage, *ib.*
  - whether ademption affects executory gifts over, *ib.*, 597
  - adeemed legacy not revived by codicil, 597
  - advances made before the will, *ib.*
- of legacies given to strangers for a purpose, *ib.*
- by express directions (see HOTCHPOT CLAUSES), 597—600

ADMINISTRATION, *see* 187-

- of personalty, governed by domicile, 3
- of charitable gifts, 301, 302
- of assets, 618—669; see ASSETS, CHARGE, EXONERATION, MARSHALLING, COSTS.

## ADMINISTRATOR,

- durante minore etate*, power of, 356
- power of sale not implied in, 362
- powers of, over personalty, 364

## ADVANCEMENT,

- power of, not confined to minority, 369
- what payments authorised by, *ib.*
- payment to husband, *ib.*
- payment of debts, *ib.*
- effect of, upon vesting, 416
- in legatee's life, whether gift by will is, 435, 436

**ADVANCES,**

directions to bring into hotchpot, 597—600

**ADVOWSON,**

devise of, effect of, 154

**AFTER-ACQUIRED LANDS,**

what is an intention to dispose of, before the Wills Act, 89  
effect of general devise on, 161, 162

**AFTER THE DEATH,**

effect of the words upon vesting, 402, 403  
on a gift in default of issue, 543

**AGENT,**

whether he can give receipt, 364  
request to employ person as, how far binding, 380

**ALIEN,**

will of, 18  
may be legatee, 93

**ALIENATION,**

gift over of annuity upon, 389, 390  
direction against, effect of upon rule in Shelley's case, 345  
restraints upon (see **CONDITIONS REPUGNANT**), 458—460  
meaning of, 463

**ALIQOT PART**

of a fund, what is a gift of, 109, 110

**ALL AND EVERY**

create joint tenancy, 318

**ALTERATIONS**

in will, rules as to, 32—34  
—— of soldier, 35  
—— made in mistake as to fact, 577, 578

**ALTERNATIVE CONTINGENT LIMITATIONS,**

whether rule in Shelley's case applies to, 336  
distinguished from limitations dependent on prior limitations, 476, 477

**AMBIGUITY, 99, 100, 208, 209. See EVIDENCE—DESCRIPTION.****ANATOMY,**

gift of body for purpose of, 80

**"AND," when changed into "or,"**

upon the context in a direct gift, 581  
in gifts over, 528—530  
if A. dies unmarried and without issue after devise in fee, 528  
after devise for life with remainder to children, *ib.*  
after devise in tail, gift over if A. dies under twenty-one and without issue, *ib.*  
gift over upon two events, one of which includes the other, 529  
—— two independent events, 530

**AND ALSO,**

effect of, in introducing specific gift, 112

**ANNUITIES,**

from what time they begin to run, 142  
postponement of, to debts and legacies, *ib.*  
arrears of, interest on, *ib.*



**ANNUITIES—continued.**

- gift of, charged on land with powers of distress is specific, 110
- are included in term of legacies, 153
- rank with legacies for purposes of abatement, 620
- how valued for purpose of abatement, 621
- characteristics of, 387—390
  - and rent-charge distinguished, 387
  - right to distrain by statute, *ib.*
  - annuitant may bring action to administer, 387
  - charge upon realty and personalty, *ib.*
  - rule in Shelley's case applies to rent-charge, *ib.*, 388
  - given with words of inheritance devolve like realty, 388
  - cannot be entailed, *ib.*
  - though given with words of inheritance remain personalty, *ib.*
  - charged upon realty without words of inheritance are personal estate, *ib.*
  - direction to lay out sum in purchase of, is gift of sum, 388
  - purchase annuity of given amount, *ib.*, 389
  - gift over on bankruptcy and alienation, 389
  - when annuitant entitled to value of, 390
- duration of, 390—397
  - simple gift of, is for life, 390
  - charged on freeholds, 390
    - chattels real, *ib.*, 391
  - created *de novo* not affected by section 28 of Wills Act, 390, 391
  - for maintenance, 391, 396
  - gift of property to produce, 391
  - direction to purchase, *ib.*, 392
  - gift of part of income of a fund, 392
  - devise of testator's property on trust to pay, *ib.*, 393
  - direction for cesser in certain events, 393
  - power to appoint in fee, *ib.*
  - limitations inconsistent with a mere life interest, *ib.*
  - gift of, to several or their heirs, *ib.*
  - implication of survivorship between annuitants, 393—396. See SURVIVORSHIP, IMPLICATION OF.
  - gift of, during minority of an infant, whether it determines with infant's death under twenty-one, 396, 397
- whether charged on income or corpus, 635—638
  - direction to set apart a fund to fall into residue, 636
    - with gift over, *ib.*
  - gift over of the fund subject to or after payment of, 637
  - corpus treated as entire after annuitant's death, *ib.*
  - gift of surplus income of each year, *ib.*
  - when a continuing charge on rents and profits, *ib.*, 638. *Wormald v. Muzen*, 17 Ch. D. 16
  - when primary charge on land, 641. *Patching v. Barnett*, revd. W. N. 1881, 108

**ANTICIPATION, RESTRAINT UPON,**

- of annuity, effect of, 389
- whether can be void for remoteness, 431
- when valid, 460, 469
- what creates, 470, 471
- will be inserted in settlement to separate use, 561

**APPOINTMENT (see POWER),**

- under a special power with invalid condition added, raises no election, 84, 91
- it may, if the whole appointment is invalid, 85
- whether it takes fund from donees in default in all events, 180, 181. *In re Ickeringill's Estate*, 17 Ch. D. 151

**APPOINTMENT—continued.**

- may take effect as devise, 181
- class to take in default of, 249—251
- of trustees of inheritance passes fee, 346
- to joint tenants, effect of lapse, 602
- to objects and non-objects, effect of, 318, 606
- with invalid restrictions added, 377

**APPORTIONMENT**

- of rents between residuary and specific devisees, 135
- does not apply to profits of a private partnership, *ib.*
- applies where an absolute is cut down to a life interest, *ib.*
- of condition, 457
- of money charged on realty and personalty, and given to charity, 192

**APPROPRIATION**

- to answer legacy, when binding, 623, 624

**APPURTENANCES,**

- what will pass as, 155, 165

**ARREARS**

- of an annuity, whether they carry interest, 142

**ARTICLES,**

- meaning of, 184

**AS FAR AS the rules of law and equity permit,**

- effect of these words on doctrine of perpetuity, 438, 439
- whether they create an executory trust, 552, 553, 558
- whether they carry on chattels directed not to vest in a tenant in tail dying under twenty-one, 552, 553
- effect where the trust is clearly executory, 558

**ASSENT**

- of husband to wife's will, 17

**ASSETS,**

- order of, for payment of debts, 618—624
  1. general personal estate, 618
    - specific fund charged, *ib.*
    - residue undisposed of, *ib.*
    - legacy in lieu of share of residue which lapses, is payable out of general personal estate, *ib.*, 619
    - whether lapsed share of residue exonerates share well disposed of, 619
  2. real estate devised for payment of debts, whether descended or not, *ib.*
  3. real estate descended not charged with debts, 620
  4. real estate charged with debts and devised or descended, *ib.*
  5. pecuniary legacies, *ib.*
    - whether lapsed legacy exonerates one that takes effect, *ib.*
    - what are, for purposes of abatement, *ib.*, 621
    - priority between, 621
    - legacies and residue, 622, 623
  6. real estate devised not charged with debts, 624
  7. property appointed under a general power, *ib.*
  8. foreign land follows *lex loci*, *ib.*
- how costs of administration are payable, 625—627
  - See *Patching v. Barnett*, Law Times, July 2, 1881
- loss of, on whom it falls, 623

**ASSIGNS,**

- trust to be executed by the survivor of the trustees, his heirs and assigns, is devisable, 75
- effect of, used as a word of limitation, 272, 273
- when superadded to representatives, 286

- AS WELL AS**,  
effect of, in making gift specific, 112
- AT**,  
effect of, in a devise of specific lands, 96, 97
- ATTESTING WITNESS**,  
signature by, to will, 29, 30  
gifts to, 94
- AT THE DEATH**,  
gift over, when it cuts legatee down to life interest, 473, 484, 579  
effect of, upon gift in failure of issue, 543
- ATTRACTION**,  
doctrine of, 369, 372, 373, 374, 541
- B.**
- BANK NOTES**  
will pass as money, 144
- BANKRUPTCY**,  
gift over on, of annuity, 389  
\_\_\_\_\_ when effectual, 461, 466  
\_\_\_\_\_ construction of, 464, 465  
when it determines power to appoint to children, 463
- BASTARDS.** See **ILLEGITIMATE CHILDREN**, 226—239
- BELIEF**,  
erroneous, will not raise election, 83  
legacy given from erroneous, 577, 578
- BENEFICIAL**  
power, meaning of, 173, 174  
interest, meaning of, 409
- BENEFIT**, words of  
whether they prevent legal estate from passing, 168  
superadded to executors, 370  
\_\_\_\_\_ gifts in trust, 384
- BENEVOLENCE**,  
purposes of, are not charitable, 290, 291
- BEQUEATHED**,  
gift of property, 148
- BLANKS**  
may be left in will, 82  
may not be filled up by parol evidence, 208, 209, 242
- BONA VACANTIA**,  
Crown entitled to, 612
- BONUS**  
on shares declared before the death, will not pass with the shares, 134  
when apportionable, 135  
right to, as between tenant for life and remainderman, 644
- BOOK-DEBTS**,  
what passes under, 148, 156

- BORN**,  
 gift to children, whether it excludes those afterborn, 240
- BORN OR TO BE BORN**,  
 effect of words in extending class, 251, 252
- BOROUGH ENGLISH LANDS**,  
 devise of, to the heir of a person, 269
- BUILD**,  
 gift to, charitable institutions, 307—310
- BUSINESS**,  
 cannot be carried on without authority, 366  
 what capital may be employed in, *ib.*  
 effect of direction to carry on, *ib.*, 367  
*See In re Moryan*, 29 W. R. 733
- C.
- CALLS**  
 upon shares, when payable by specific legatee, 125, 126
- CAPACITY**,  
 testamentary, what is, 14—19
- CAPITA, PER** (see DISTRIBUTION), 252—256  
 gift to several families goes to children, 268
- CAPITAL AND INCOME**,  
 accumulations released by statute are capital of residue, 448  
 whether income of accumulations is capital of residue, *ib.*  
 as between tenant for life and remainderman,  
   dividends declared before death of tenant for life are income, 643  
   \_\_\_\_\_ on shares declared after death of tenant for life, *ib.*, 644  
   partnership profits, 644  
   debts, *ib.*  
   effect of a power of declaring whether profits shall be income or  
     capital, *ib.*  
   bonus out of profits, *ib.*  
   timber, *ib.*, 645  
 (See TENANT FOR LIFE AND REMAINDERMAN.)
- CASH**,  
 meaning of, 147
- CHANGE**  
 of interest of testator,  
   acceptance of new lease, 122  
   purchase of equity of redemption, 123  
   effect of Wills Act, *ib.*
- CHANGING WORDS**,  
 "or" will not be changed into "and" in a condition precedent, 581  
   (See OR), 331, 393, 492  
 "fourth" changed into "fifth," 582  
 change of "and" into "or" in gifts over, 528—530, 581  
 change of "or" into "and," 530, 531
- CHARGE**  
 on realty, when it includes legacy by unattested codicil, 55  
 on specific gift when adeemed, 119  
 may operate by way of devise, 181  
 upon devisee, effect of in passing fee, 326  
 on land, vesting of, 406, 407

**CHARGE—continued.**

- reduplication of, under referential gift, 555
- power to, when inserted in settlement, 561, 562
- will not fail by revocation of devise, subject to charge, 576, 577
  - death of devisee, 604
- will by ademption of gift, subject to the, *ib.*
- devise subject to, which fails, 608, 609

**CHARGE OF DEBTS,**

- effect of, in excluding trust estates from general words, 169
- in excluding property subject to a power from general words, 174
- on estates of trustees, 351, 352
- whether it gives executors a power of sale, 360—363
- power to give receipt implied from, 364
- what debts it includes,
  - debts subsisting at the death, 629
  - damages accrued after the death, 630
  - direction to pay debts subsisting at a particular time, *ib.*
    - of another, *ib.*
  - deduct debts due from a legatee, *ib.*
  - testamentary expenses, what are, 625
  - funeral and other expenses, *ib.*
- upon what property it takes effect,
  - charge of debts and legacies charges all the testator's property, 630
  - legacies merely, is confined to residuary lands, 631
- how created,
  - devise of rentcharge, 631
  - charge on realty in case personalty insufficient, *ib.*
  - general direction to pay debts, *ib.*
  - whether it charges realty left to descend, *ib.*, 632
  - subsequent express charge of certain debts on particular lands is immaterial, 632
  - subsequent charge of all debts on personalty is immaterial, *ib.*
    - certain lands, *ib.*
  - effect of exception of certain lands out of subsequent express charge, *ib.*
  - express charge not controlled by subsequent partial charges, *ib.*
  - effect of a direction to executors to pay debts, *ib.*
  - where no realty is devised to them, *ib.*
  - land devised to them is charged, *ib.*, 633
  - whether legacies to be paid by executor are charged on lands devised to him, 633
  - it is immaterial whether the devise is for life or in tail, 633
  - unequal devises to executors, *ib.*
  - gift of real and personal estate after payment of debts charges both, *ib.*, 634
- power to raise debts out of rents and profits charges corpus, 634
  - whether annuity is charged on corpus or income, 635—638

**CHARITY, gifts to, 290—313**

- defined, 290—296
  - gifts for educational and religious purposes, 290
  - for objects of liberality and benevolence, *ib.*, 291
  - for private, 291
- gift to voluntary society, *ib.*
  - for benefit of parish, *ib.*
  - to build or repair a tomb, *ib.*
  - to repair a church, *ib.*, 292
  - in favour of Dissenters, Jews, and Roman Catholics, *ib.*
  - to monastic orders, *ib.*, 293

CHARITY—*continued.*

- gift for release of poachers, 293
  - superstitious uses, *ib.*
  - for masses, *ib.*
  - for masses in Ireland, *ib.*, 294
  - for relief of aged, impotent, and poor, 294
  - for widows and orphans, *ib.*
  - to poor relations, whether charitable, *ib.*, 295
  - in respect of an office, 295, 296
  - to poor clergymen to be selected by a trustee, 296
  - to trustees of a charity without more, *ib.*
- doctrine of *cy près*, 296—301, 311
  - gift to a particular charity may lapse, 296
  - misdescription of a charitable society, 297
  - gift for definite charitable object may fail, *ib.*
  - inquiry directed as to the possibility of an object, *ib.*
  - gift upon a remote event is void, *ib.*
  - gift for charitable or other indefinite objects, 298
  - where part must be applied to charity, *ib.*
  - when there is a general charitable intent, 299
  - whether particular charitable gifts fall into residue given to charity, *ib.*
  - gift contrary to policy of statute, *ib.*
  - increase in value of rents and profits given to, *ib.*, 300, 301
- administration of, 301, 302
  - gift to charitable institution is administered by the institution, 301
  - trustees administered by court, *ib.*
  - foreign trustees, *ib.*
  - where a discretion left to the trustee, 302
- what may not be given to charity, 302—313
  - effect of the statute of Mortmain, *ib.*
- what is an interest in land within the Act. 302—306
  - money to arise from sale of land, 302
  - purchase money for land contracted to be sold, 303
  - money to arise from sale of land under a prior instrument, *ib.*
  - crops, leaseholds, 304
  - money secured by mortgage of land, *ib.*
  - equitable mortgages and mortgages of leaseholds, *ib.*
  - mortgages of real and personal property when apportioned, *ib.*
    - of rates on occupiers, *ib.*
    - of poor rates, *ib.*
    - of turnpike tolls and harbours and dock rates, *ib.*
  - Metropolitan Board of Works Stock, *ib.*
  - arrears of interest due on a mortgage, 305
  - rent accrued since the death on land contracted to be sold, *ib.*
  - judgment debt charged on realty, *ib.*
  - covenant to leave money by will is void as regards realty, 305
  - shares in public companies are not within the statute, *ib.*
  - debenture stock, debentures, mortgage debentures of railways, 305, 306
  - bonds charged on police rates, 306
  - arrears of rent due at the death, *ib.*
  - nor apportioned rent, *ib.*
  - nor royalty on minerals, nor tenant's fixtures, *ib.*
  - legacy duty on charitable legacy must be paid out of pure personalty, 302
- what is personalty to be laid out in land, 306—310
  - money to be invested on real or mortgage security, 306
  - money ultimately to be invested in land, *ib.*
  - where the trustees have an option, *ib.*
  - gift to pay off a mortgage debt, *ib.*, 307

**CHARITY—continued.**

- gift to improve, enlarge, or repair a charitable institution, 307
- build, *ib.*
- discretion to trustees to build or not, *ib.*
- trustees to select charities, *ib.*
- gift to establish a charity, 308
- provide a charity, *ib.*
- support or found, *ib.*
- endow, *ib.*
- evidence of intention that land was not intended to be purchased, *ib.*, 309, 310
- gift to charity existing for purchase of land, 310
- foreign charity, *ib.*
- universities of Oxford and Cambridge, and Eton, Winchester, and Westminster, *ib.*, 311
- whether a devise to a college carries legal estate, 311
- charities empowered to hold lands, *ib.*
- money to be employed on land devised to charity, *ib.*
- redemption of land tax, *ib.*
- Church Building Acts, *ib.*, 312
- endowment of districts, 312
- secret trust for, bad, 313
- whether legal estate passes, *ib.*
- gift over of property given to, cannot be too remote, 424
- whether accumulation directed in favour of, may be stopped, 447
- gift to, of residue after void gift is good, 585
- marshalling in favour of, 628, 629

**CHATTEL INTEREST,**

- when trustees take, 352, 353

**CHATTELS,**

- in a house, bequest of, 121, 122, 150, 151, 186
- meaning of, 160
- bequest of, by reference to limitations of realty, 552—555
- effect of revocation of trusts of realty, 577
- executory trust to settle, 558
- who entitled to, in default of next of kin, 612

**CHILD,**

- when used as a word of limitation, 332, 333

**CHILD EN VENTRE,**

- is considered as born for purposes of benefit, 249
- but for no other purpose, *ib.*
- whether illegitimate, can acquire reputation of parentage, 237—239
- effect of, upon rule in *Wild's case*, 334

**CHILDREN,**

- gifts to illegitimate (see **ILLEGITIMATE CHILDREN**), 226—239
- legitimate, 239—256
- whether children must be legitimate according to English law, 226, 227
- includes children by a first and second marriage, 239
- does not include grandchildren, *ib.*, 240
- words of futurity will not exclude existing children, 240
- posthumous children, *ib.*
- words referring to existing children will not exclude afterborn, *ib.*
- express gift to a child will not exclude him from a gift to children, *ib.*
- gift to a class for life and then to their children, when some members of the class are dead at the date of the will, 241

**CHILDREN—continued.**

- gift to the children of A. and B., 241
- a certain number of children when there are more, *ib.*, 242, 243
- when the class is ascertained (see **CLASS WHEN ASCERTAINED**), 243—251
- effect of words of futurity upon the ascertainment of the class, 251
- gifts to parent and, whether they take successively or jointly, 314—317
- used as a word of limitation (see *Wild's case*, rule in), 332—335
- gifts to, who survive their parents (see **VESTING**), 418—422
- portions for, when excepted from Thellusson Act, 445, 446
- gifts over upon death without, 532, 533
- without leaving, *ib.*
- unmarried and without, 528

**CHOSSES IN ACTION,**

- whether they pass as things in a locality, 150, 151, 160

**CHURCH,**

- gift to build a, 312

**CLASS,**

- gift to, right to income, 137
- one of a, 219
- devise to a, in tail, whether they take jointly or successively, 314
- gift to a contingent, and upon a contingency, 403, 404, 409, 410
- gifts to a, when the youngest attains twenty-one, 417, 418
- doctrine of lapse in case of gifts to a, 605, 606
- what is a gift to a, 607
- gift to persons "before named," *ib.*
- five daughters of A., *ib.*
- executors "herein-named," *ib.*
- a class and an individual, *ib.*, 608

**CLASS WHEN ASCERTAINED,**

- when the gift is to younger children, 221, 222
- when the gift is to younger children upon a contingency, *ib.*
- when the eldest son is to be ascertained, 224
- in gifts to children, 242—252
  - immediate gift or devise, 242, 243
  - contingent remainder, 244
  - copyholds, 245
  - effect of recent statute, *ib.*
  - equitable remainder, *ib.*
  - future gifts, 246
  - gift of reversionary property, *ib.*
  - to be paid at twenty-one, *ib.*
  - of maintenance out of vested shares, 247
  - division when the youngest attains twenty-one, 248
  - gift of fixed sum to each member of a class, *ib.*
  - to children who attain twenty-one, *ib.*
  - child *en ventre* admitted, 249
  - conceived before but born after marriage, *ib.*
  - class to take in default of appointment, 249—251
  - where the only gift is through the power, 249, 250
  - power to appoint by deed or will, 250, 251
  - effect of words of futurity, 251, 252
- in the case of gifts to issue, 262
- when the gift is substitutional, *ib.*
- in remainder, *ib.*



**CLASS WHEN ASCERTAINED—continued.**

- in the case of gifts to relations, 264—266, 280
  - the class is ascertained at the death of the propositus, 264
  - where the tenant for life is sole next of kin, *ib.*, 265
  - when the class to take in default is ascertained, 265, 266
- in the case of gifts to next of kin or heirs, 280—283
  - same rules apply to realty, personalty, and a mixed fund, 280
  - next of kin are ascertainable at the death of the propositus, *ib.*
  - when the tenant for life is sole next of kin, *ib.*, 281
  - exception of persons who could only be next of kin if the tenant for life were dead, 281
  - next of kin of a deceased person when the tenant for life is sole next of kin, *ib.*
  - same rules apply in the case of executory gifts, *ib.*, 282
  - when the gift is to nearest of kin of my family or relations, *ib.*
  - effect of words of futurity upon the rule, 282, 283
- in the case of substitutional gifts, 500, 501
  - gifts to survivors (see **SURVIVORS**), 511—516

**CLEAR SUM,**

- gift of, whether free from legacy duty, 143

**CODICIL,**

- revocation of will by, 42—44, 576, 578, 579
- revival of will by, 58—60
- See *In bonis Stedman*, 29 W. R. 743.

**COLLATERAL HEIR,**

- devise to, in default of heirs, creates an estate tail, 324

**COLLEGE,**

- devise to, 310, 311

**COMMON, TENANCY IN,**

- what creates (see **JOINT TENANCY**), 320—322

**CONCURRENT AND SUCCESSIVE INTERESTS, 314—317****CONDITIONS**

- of original apply to substituted legacy, 117, 118
- distinguished from cases of election, 82, 83
  - from trusts, 382, 398
  - from limitations, 398
- devise subject to a proviso, 399
- estate of trustees to preserve, *ib.*
- general test of. precedent, *ib.*, 400
- involving consideration, *ib.*
- requiring time for their performance, *ib.*
- precedent must be fulfilled whether impossible, impolitic, or illegal, 400
  - involving physical impossibility void in personality, *ib.*
  - discharged by testator, *ib.*
  - *contra bonos mores* void in personality, *ib.* See **VESTING**, 400—406
- subsequent, 450—471
  - impossible, impolitic, or illegal, are ineffectual, 450
  - whether a gift over is material, *ib.*
  - marriage with consent of several persons becomes impossible by death of any, *ib.*
  - not performed through ignorance take effect, 451
  - unless the devisee is heir, *ib.*
  - forfeiting a legacy if not claimed within a given time, *ib.*
  - what amounts to a claim, *ib.*
  - whether effectual without gift over in realty, *ib.*

CONDITIONS—*continued*.

- whether personalty follows the same rules, 451, 452
- test of validity of, 452
- of residence must be clearly defined, *ib.*
- not to dispute a will are valid, *ib.*
- not to institute legal proceedings, *ib.*, 453
- to require bonds not to marry, 453
- in restraint of marriage, 453—457
  - applies to lawful marriage, 453
  - imposed on devisees for life or in fee are valid, *ib.*
  - devisee in tail, *ib.*
  - bad in case of personalty, *ib.*
  - same rule applies to a mixed fund, *ib.*
  - whether same rule applies to legacy out of proceeds of sale of land, *ib.*
  - limitation till marriage is good, *ib.*
  - in partial restraint of marriage are good, 454
  - restraining widow or widower from marrying, *ib.*
  - requiring marriage with consent, *ib.*
  - See *In re Brown's Trusts*, 29 W. R. 604.
  - restraining marriage before a certain age, *ib.*
- doctrine of, *in terrorem*,
  - to what conditions it applies, 454, 455
  - conditions in partial restraint of marriage, *ib.*
  - not to dispute a will, 455
  - effect of a gift over, *ib.*
  - whether the doctrine applies to conditions precedent, *ib.*
- waiver of, by the testator, *ib.*, 456
- whether second marriage with consent fulfils condition requiring consent, *ib.*
- performance of, requiring consent, *ib.*
- consent of several persons, *ib.*, 457
- of guardian not discharged by death of guardian appointed by the will; *In re Brown's Trusts*, 29 W. R. 604
- apportionment of condition, 457
- right of pre-emption within given time, *ib.*
- requiring a release within a given time, 458
- performance of, generally, *ib.*
- repugnant, 458—471
  - general restraints upon alienation are bad, 458
  - partial restraints upon alienation are valid, 459
  - whether restraint upon alienation by any particular assurance is good, *ib.*
  - direction not to raise rents, *ib.*
  - gift over of personalty on alienation, *ib.*
  - gift over on alienation before certain time, *ib.*, 460
  - before period of distribution, 460
  - gift over if legatee dies intestate, *ib.*
  - if prior gift is void at law, *ib.*
  - condition not to bar entail, *ib.*
  - estate tail cannot be determined in part, 461
  - directed to cease as if tenant in tail were dead, *ib.*
  - absolute interest directed to cease as if donee were dead, *ib.*
  - enjoyment cannot be postponed beyond twenty-one, *ib.*
  - life interest must be subject to bankruptcy law, *ib.*
  - whether trust for maintenance passes to creditors, *ib.*
  - life interest may be determined on bankruptcy, 462
  - distinction between limitations and conditions is immaterial, *ib.*
  - effect of gift over upon bankruptcy for the maintenance of the bankrupt and his family, *ib.*, 463

CONDITIONS—*continued.*

- whether bankruptcy determines a power of appointing to children, 463
- alienation, what it includes, *ib.*
- insolvency, meaning of, *ib.*
- gift over upon bankruptcy, whether it includes subsisting bankruptcy, 464, 465
- effect of annulment of bankruptcy, 465
- bankruptcy during prior life estate, *ib.*, 466
- what words create a separate use, 466—468
  - corpus as well as income may be given to, 466
  - effect of separate use on curtesy, *ib.*
  - separate, own use, proper hands, 467
  - own disposal, where the legatee is married, *ib.*
  - receipt clause, *ib.*
  - gift for maintenance, 468
  - word "sole" does not *prima facie* create separate use, *ib.*
  - under what circumstances it may, *ib.*, 469
- what words create a restraint upon anticipation, 469—471
  - restraint upon income, 469
    - corpus, *ib.*, 470
  - the restraint determines with coverture, 470
  - but revives on a second marriage, *ib.*
  - whether the restraint upon anticipation imposed upon the exercise of a power attaches to the gift in default of appointment, *ib.*, 471

CONSENT,

- to exercise of power of sale,
  - by infant, 357
  - by tenant for life after alienation, *ib.*
  - bankruptcy, *ib.*
  - whether survivor of class can give, 358
- to investment,
  - must be given previously, 365
- marriage with (see CONDITIONS), 450, 454—456, 490

CONSISTING IN,

- effect of words, in restraining large words, 183

CONSTRUCTIVE TRUST,

- whether it passes under general words, 169, 170

CONSUMABLE ARTICLES

- cannot be given in succession, 472

CONTINGENCY,

- gift upon, must be literally fulfilled, 404
- importing no more than determination of prior estates, *ib.*, 405
- not imported into gift to a single child, 410
- reflected back into constitution of original class, *ib.*, 411
- gift to a class upon a, contingency when imported into the constitution of the class, 421, 422
- where it runs through a series of limitations, 477, 478
- where events which happen include named events, 481—483
- gift over upon death treated as, 483—485
- coupled with, 485—490
- attaching to original not extended to substitutional legatees, 498, 499

CONTINGENT GIFT,

- when it carries income, 133—137
- interest on, 139, 140

CONTINGENT POWER,  
execution of, 179

CONTINGENT REMAINDERS (see VESTING), 400—406  
incidents of, 244, 245, 474, 475  
trustees to preserve, what estate they take, 350, 351

CONTINGENT WILL, 11, 12

CONTRACT FOR SALE,  
effect of, on devise, 204, 205  
——— on devise of trust estates, 169, 170

CONVERSION, 192—206

what effects, 192—194

direction to consider land personalty, 192

direction to divide, *ib.*

power to convert, *ib.*

conversion upon request, 193

power to continue securities, *ib.*

discretion controlled by general intention, *ib.*, 194

——— by subsequent limitation, 194

whether directed for all purposes of the will, 194—197

direction that realty should form part of personalty, 194, 195

gift of residue of proceeds of sale, 195

whether residuary bequest passes proceeds of sale of realty, *ib.*

direction to convert at a certain time and divide, *ib.*

absolute direction to sell, *ib.*

mixed fund to be converted, 196

when the personalty and proceeds of sale of realty are treated as  
separate funds, *ib.*, 197

who is entitled to property to be converted but undisposed of, 197, 198

heir at law and next of kin are entitled, 197

direction that proceeds of sale of realty are to be part of the personal  
estate, *ib.*

declaration that the proceeds of sale shall not lapse for the benefit of  
the heir, *ib.*

surplus of sale of realty directed to be personal estate and given to the  
executors, *ib.*

money to be laid out in land results for next of kin, 198

how the heir and next of kin take property directed to be converted, 198, 199

where the object of the conversion wholly fails, 198

where it fails partially, *ib.*

where realty is directed to be converted and charged with debts, *ib.*, 199

at what period the failure of the purposes of the conversion is to be  
determined, *ib.*

personalty to be laid out in land goes to next of kin as land, *ib.*

as between tenant for life and remainderman, 199—203

wasting property must be converted, 199

reversionary property, 199

specific enjoyment, what entitles the tenant for life, 200

when the interest of successive takers are not opposed, *ib.*

settlement of an absolute interest, *ib.*

discretion to convert, *ib.*, 201

power to retain, 201

gift of enumerated things, 201, 202

——— a pure residue, 202

——— rents and profits when there are only leaseholds, *ib.*

property specifically given at death of tenant for life, 203

trust to convert at death of the tenant for life, *ib.*

power to sell with consent of tenant for life, *ib.*

**CONVERSION—continued.**

- debts must in all cases be got in, 203
- by events extraneous to the will, 203—206
- effect of a contract for sale, 203, 204
- option to purchase, 204
- contract to build a house, 205
- sale under statutory powers, *ib.*
- notice to treat, 205
- right to rents and profits till completion, 205, 206
- sale under a decree, 206
- conversion into fee simple of renewable leaseholds, *ib.*
- trust for, when it should be exercised, 364, 365

**COPYHOLDS,**

- devise of, since Wills Act, 71
- effect of general devise on, 164
- freebench in, barred by general devise, *ib.*
- devise of estate tail in, 329
- not within the Statute of Uses, 369
- direction to sell, effect of, 356
- contingent remainders in, 475

**CORPORATION,**

- whether it can take by devise, 92, 93

**COSTS OF ADMINISTRATION,**

- order of assets for payment of, 625—627
- general costs of, payable out of personalty, 625
- additional costs of administering realty payable out of realty; *Patching v. Barnett*, Law Times, July 2, 1881, overruling *Re Middleton*, W. N. 1881, 93
- testamentary expenses, *ib.*
- special case, *ib.*
- what included in, 626
- mixed residue bears, rateably, *ib.*
- liability of unappointed fund, *ib.*
- how far descended estates are liable, *ib.*, 627

**COUSINS,**

- meaning of, 258, 259

**COVENANT,**

- voluntary, to leave money by will to charity, 305
- to settle, property preserved from lapse not within, 605

**CRANWORTH'S, LORD, ACT,**

- effect of, in allowing maintenance, 140, 141

**CREDITORS,**

- right of, to be paid out of intestate's estate raises no election, 84
- where business carried on after death, 366, 367
- bequests to, whether subject to lapse, 602, 603

**CROSS-REMAINDERS,**

- implication of (see IMPLICATION), 571—573
- when the class to take under is ascertained, 262

**CROWN**

- is entitled, in default of next of kin, to chattels, 612
- not entitled to land given in trust for sale, *ib.*
- when it is entitled to residue not attempted to be disposed of, 614

**CUMULATIVE AND SUBSTITUTIONAL LEGACIES, 114—118**

- legacies of equal amount by the same instrument, 114
- of unequal amount, *ib.*

**CUMULATIVE AND SUBSTITUTIONAL LEGACIES—continued.**

- legacies by different instruments, *ib.*, 115
- gift of residue and of a particular legacy, 115
- when the instruments are substitutional, *ib.*
- or mere repetitions, 116
- evidence that the legacies were meant to be substitutional, *ib.*, 117
- legacies given from same motive, 117
- liability of, to the incidents of original gift, *ib.*, 118

**CURTESY,**

- effect of separate use upon, 466, 467
- husband of devisee entitled to, where devise saved from lapse by sect. 33;  
*Eager v. Furnivall*, 17 Ch. D. 115

**CUSTOM,**

- evidence of, admissible, 95, 208

**-CY PRÆS,**

- doctrine of, 441—443
- is a rule of construction, 441
- applies to execution of a power by will, *ib.*
- the parent will take an estate tail when the property will go in the course marked out, *ib.*
- may be applied to some of a class and to part of the property included in a devise, *ib.*
- applies though the will gives joint estates tail to children, *ib.*
- does not apply where the property would not go in the course marked out by the testator, *ib.*, 442
- whether it applies where the intention is to create life estates for ever, 442
- does not apply where estates in fee are given to children, *ib.*, 443
- does not apply to personalty or to a mixed fund, 443
- in case of gifts to charity (see CHARITY), 296—301, 311

**D.****DEATH,**

- when the will speaks from the, 98, 150, 162
- before date of will of original legatees, effect of, on substitutional gift (see SUBSTITUTION), 493—498
- before a given age, gift over upon, 480—483
- in case of, gift over upon (see GIFT OVER), 483
- before vesting, ——— (see VESTING), 369, 370
- before payment, ——— (see PAYMENT), 370—374
- before receipt, ——— (see RECEIPT), 374—376

**DEATH WITHOUT CHILDREN,**

- gift over upon, when children will be read issue, 532
- whether it means children living at the death, 533
- does not give children any interest by implication, 568, 569

**DEATH WITHOUT HAVING ANY CHILD,**

- gift over upon, construction of, 532, 533

**DEATH WITHOUT ISSUE,**

- gift over upon,
  - influence of, upon the prior estate,
    - in the case of realty,
      - effect of, on prior devise in fee, 324
      - on prior devise for life, 563, 564
      - on the rule in Shelley's case, 338, 343, 344

**DEATH WITHOUT ISSUE—continued.**

- in the case of personalty,
  - on a bequest to A. for life, 371
  - on a bequest to A. for life, then to the heir of his body, *ib.*
  - to A. and his issue, 373
  - to A. for life and then to his issue, 374
- when the defeasibility will be limited within a certain period (see *GIFTS OVER*), 485—490
- effect of sect. 29 of the Wills Act upon, 534, 535
  - at what time the failure must take place where it is confined within a certain time, 534
  - where the devise is to persons then living, 535
  - death without issue male is within the Act, 536
  - the section does not apply to heirs of the body, *ib.*
- in what cases the referential construction of, will be adopted,
  - in the case of realty, 536—539
    - where the gift over is in default of such issue after limitations in tail, 536
      - to children in fee, *ib.*
      - intention that children were to take in tail, *ib.*
      - after limitations for life, *ib.*
      - giving first son a life interest and other sons estates tail, *ib.*, 537
    - where the word such is inaccurately used, 537
  - where the gift over is in default of issue merely after limitations to issue in fee or tail, 537
    - to some of the issue, *ib.*, 538
  - where the failure of issue is restricted to the ancestor's death, 538
  - after a power to appoint to issue, 539
  - where the limitations to issue are contingent, *ib.*
  - after limitations to issue without words of inheritance before the Wills Act, *ib.*
- in the case of personalty,
  - after gifts to children absolutely, 539, 540
  - when the gifts to children are contingent, 540
  - construction assisted by other limitations, 541
  - where all the issue are provided for, *ib.*
  - after a gift to parent and children jointly, *ib.*
- gifts over upon, before the Wills Act, 541—547
  - where they import an indefinite failure, 541
  - where the failure of issue will be restricted,
    - where the issue is the testator's own issue, 542
    - where the ulterior limitations are for payment of debts, *ib.*
  - where the gift over is upon death under twenty-one without issue, *ib.*
  - gift over on, at, or after the death of the parent, 543
  - direction to pay a sum of money on the decease of the parent, *ib.*
  - gift over to persons "then living," 544
    - class ascertainable upon some collateral event, *ib.*, 545
    - survivors, 545
  - where survivor means those who survive the failure, *ib.*
  - where survivorship is only between the devisees, *ib.*
  - gift over to named person, 546
  - intention to confer personal enjoyment, *ib.*
  - where the subsequent estates are all for life, *ib.*
  - where the estate devised is *pur autre vie*, *ib.*

**DEATH WITHOUT ISSUE—continued.**

where the estate devised is a reversion limited in failure of certain lines of issue, 546, 547

**DEATH WITHOUT LEAVING CHILDREN,**

(See **LEAVING**), 532, 533

**DEBTS,**

gift in satisfaction of, raises election, 82  
 of a third person, release of, may raise election, 83  
 gift of particular, is specific, 103, 109  
 gift of, when adeemed, 121  
 owing from legatee, right to retain, 123, 124  
 are profits of year when paid, 134  
 interest on legacy in satisfaction of, 139  
 bequest of, meaning of, 149  
 book, *ib.*, 156  
 general direction to pay, executes general power, 178, 179  
 whether it executes it *pro tanto* only, 180  
 direction to pay, effect of, on estates of trustees, 348, 349, 352  
     (See **TRUSTEES, ESTATES OF.**)  
 charge of, effect of, on estates of trustees, 347, 352  
     whether it gives executors a power of sale, 360—363  
     power to give receipts implied from, 364  
 contracted by executor, *ib.*  
 accumulation for payment of, whether void for perpetuity, 433  
     excepted from Thellusson Act, 445  
 what, are excepted from Thellusson Act, *ib.*  
 devise after payment of, is vested, 476  
 order of assets for payment of (see **ASSETS**), 618—624  
 charge of, what creates (see **CHARGE**), 465—473  
 what debts are within a charge of, 465, 466  
 satisfaction of, by legacies (see **SATISFACTION**), 592—594

**DECREE,**

sale under, effect of, upon conversion, 206

**DEDUCTIONS,**

free from, effect of gift, 143

**DEED,**

when it may take effect as a will, 9, 10

**DEFAULT OF,**

devise in, persons to take under prior limitations when it is a remainder, 475

**DEFAULT OF HEIRS,**

devise in, to collateral heir, 324, 325

**DEFAULT OF ISSUE,**

(See **DEATH WITHOUT ISSUE**).

**DEFEASIBILITY,**

period of, when it ceases in gifts to survivors, 508—511

(See **SURVIVORS.**)

when restricted in gifts over upon death coupled with contingency (see **GIFTS OVER**), 485—490

**DELEGATION**

of testamentary power, 12, 20



- DELUSION**,  
effect of, on testamentary capacity, 14
- DEMONSTRATIVE LEGACIES**,  
what are, 104  
gift of money out of stock, 106, 107  
charge upon a particular fund, 106, 109  
gift of money invested in a particular way, 108  
direction to pay out of a particular fund, 110, 111
- DEPENDENT RELATIVE REVOCATION**, 37—39, 577
- DESCEND**,  
direction that lands shall, 321
- DESCENDANTS**,  
meaning of, 262, 263
- DESCRIPTION**  
of things, 95—103  
what evidence admissible, 95  
word with ordinary meaning, 96  
devise of estate by name, *ib.*  
—— estate of or at A., *ib.*  
patent ambiguity, symbols, *ib.*  
property answering description alone passes, 97  
reference to occupation, *ib.*  
—— to title by which lands derived, *ib.*  
—— to county, *ib.*  
lands at or near A., *ib.*  
—— at A., *ib.*, 98  
manufactory in a street, 98  
property held under lease, *ib.*  
everything included in name at death passes, *ib.*  
part inaccurate, 99  
inconsistency, *ib.*  
name followed by occupation, *ib.*  
—— locality, *ib.*  
leading words of, what are, 100  
nothing to answer, *ib.*  
specific bequests, *ib.*, 101  
some out of more, 101  
gift of what legatee selects, *ib.*  
inaccuracy, 102  
things sold before date of will, *ib.*  
increase of value passes unless excluded, 101, 102  
inaccuracy does not avoid gift, 102  
inaccurate description of charity, 297  
of persons, 207—225  
what evidence admissible to explain, 207  
person fully answering description, *ib.*  
by Christian name or initials, *ib.*, 208  
persons unknown to testator, 208  
nicknames, *ib.*  
patent ambiguity, *ib.*  
blanks not supplied, *ib.*, 209  
inaccurate description, 209  
name accurate, description inaccurate, *ib.*  
name inaccurate, description accurate, *ib.*  
equivocation, *ib.*, 211  
equivocation on face of will, 211

DESCRIPTION—*continued.*

- equivocation explained by will, 211
- nephews, whom it includes, 212
- some one to answer name, some one description, 213
- a second son of B. where A. first son, *ib.*
- elaborate description prevails, 214
- description supplying motive, *ib.*
- gifts to persons filling a character, 214—224
- whether the person to take under particular, may depend on some future act of the testator, 64

## DEVISABLE,

- what is, 70—75
  - copyholds, 71
  - land liable to escheat, 71
  - estate *pur autre vie* to a man and his heirs, 71, 72
  - title by possession, 72
  - right to sue in testator's name, *ib.*
  - property held in joint tenancy is not, *ib.*
  - trusts, 74

## DEVISE

- of land is specific, though it be residuary, 110
- on trust for sale and division is specific, *ib.*
- by general words, 161—181

## DEVISEE,

- who may be, 92—94
  - corporations, 92
  - aliens, 93
  - felons, *ib.*
  - outlaws, *ib.*, 94
  - attesting witnesses, 94

## DEVOLVE,

- stirpital force of the word, 253

## DIE WITHOUT, &amp;c.

- (See DEATH WITHOUT, &c.)

## DIRECTION

- to pay debts,
  - executes a general power, 178
  - whether it executes it *pro tanto* only, 180
  - effect of, in creating a charge upon realty, 631—633

## DISCRETION

- of trustees,
  - to convert, when controlled by context, 194
  - effect of, upon specific enjoyment, 200
  - to apply to charity and other purposes, 298, 299, 307
  - to distribute to charity not interfered with, 302
  - to sell, whether suspended by action, 359, 360
  - to convert, how it should be exercised, 364, 365
  - to maintain, when not controlled, 367
  - to apply money for legatee, 386
  - to purchase annuity, 388, 389
  - no implication where not exercised, 570
  - to apply interest for maintenance, effect of upon vesting, 412—415

DISPOSITION

- by testator of property not his own, what amounts to, 81—91
  - when he is entitled in moieties, 86
    - \_\_\_\_\_ subject to a charge, *ib.*
    - \_\_\_\_\_ to the reversion, 87
    - \_\_\_\_\_ subject to dower, 87—89
- powers of management and, distinguished, 235
- power of, superadded to an absolute interest, 375, 376
  - \_\_\_\_\_ a life interest, *ib.*, 473, 474

DISSENTERS,

- position of, as regards charitable gifts, 292

DISTRIBUTION,

- per capita* and *per stirpes*, 252—256
- gift to children of several parents goes *per capita*, 252
- gift to several and their issue, 253
- gift to surviving children and their issue, *ib.*
- effect of a direction that parents and children are to be classed together, *ib.*
- the word "respective" has a stirpital force, *ib.*
- force of the word devolve, *ib.*
- effect of a direction to distribute *per stirpes*, *ib.*
- whether the distribution will be stirpital throughout, *ib.*, 254
- gift to parents for life and then to their children, 254, 255, 373, 374
- substitutional gifts, 255, 256
- how the stirpes are to be ascertained, 256
- gift to the families of A. and B. goes to children of A. and B. *per capita*, 268
- whether in gifts to next of kin the statute fixes the proportions as well as the persons, 276, 277
- when gift over limited to period of, 483—490

DISTRIBUTION, WORDS OF,

- superadded in case of realty
  - in devise to A. and the heirs of his body, 329
  - in devise to A. and his issue, 332
  - in devise to A. for life, remainder to his heirs, 338
  - in devise to A. for life, remainder to his issue, 343, 344
- superadded in case of personalty,
  - bequest to A. for life, remainder to his heirs, 372
  - \_\_\_\_\_ A. for life, remainder to his issue, 373, 374

DISTRIBUTIONS, STATUTE OF.

- effect of a reference to, 276, 277
- whether it regulates the proportions as well as the persons, *ib.*

DIVESTING,

- incapacity of donee over to take is immaterial, 478, 479
- in the case of substitutional gifts to survivors, 479
  - \_\_\_\_\_ to children, 479
- takes effect so far as necessary to give effect to gift over, *ib.*, 480 (see GIFTS OVER)
- period for, when limited, 485—490

DIVORCE,

- effect of, on gift to husband and wife, 217

DOMESTIC SERVANTS,

- meaning of, 215

DOMICILE,

- will of personalty governed by, 2, 3
- rules for ascertaining, 3—8
- governs legitimacy of children, 226, 227

**DOWER,**

what is an intention to dispose of widow's, before the Wills Act, 87—89  
 legacy in lieu of, what it includes, 88  
 whether legacy in lieu of, bars claim as next of kin, 450, 451

**DUPLICATE WILL,**

effect of destruction of, 46

**DUTY** (see **LEGACY DUTY**), 143

(See **APPENDIX**, 496.)

**E.****EASEMENT,**

what words will pass an, 156  
 right of way, *ib.*

**EDUCATION AND RELIGION,**

of children, directions as to, 19  
 gift for purposes of, 290

**EFFECTS,**

meaning of, 159

**EJUSDEM GENERIS,**

doctrine of, 182—186, 562

**ELDER AND YOUNGER,**

meaning of, 220—225  
*primæ facie* refers to birth, 220  
 may mean only child, 221  
 eldest son of his father, *ib.*  
 in what cases elder son means son taking the estate, 223—225  
 younger children may mean children not provided for, 223  
 under what title a son must take the family estate in order to be excluded, *ib.*  
 at what time the class is to be ascertained, 223—225

**ELDEST SON,**

when used as a word of limitation, 333

**ELECTION, 81—91**

when it arises, 81  
 compensation by person electing is a charge on his interest, *ib.*  
 legatee must elect for or against the whole instrument, *ib.*  
 gift in lieu of dower limits election to that, *ib.*  
 gift in satisfaction of a debt raises election, 82  
 only arises between title dehors and under the will, *ib.*  
 does not arise where one of two gifts is onerous, *ib.*  
 nor between two clauses of same will, *ib.*  
 distinguished from conditions, *ib.*  
 to raise, testator must dispose of something not his own, 83  
 erroneous belief not sufficient, *ib.*  
 release of debt, when it raises, *ib.*  
 in respect of what property of the legatee it arises, *ib.*, 84  
 at what time the title of the legatee must have accrued, 84  
 does not arise when the testator appoints under a special power, and super-adds illegal conditions, 84, 85  
 it does if the whole appointment is invalid, 85  
 what is a disposition by the testator of property not his own, *ib.*  
 general words limited to testator's own property, *ib.*

**ELECTION—continued.**

- when the testator is entitled in moieties, 86
- when the testator is entitled subject to a charge, *ib.*
  - to the reversion, 87
- dower, intention to dispose of lands free from, 87—89
- disposition of after-acquired lands before the Wills Act, 89
- when the heir is put to election, 89, 90
- next of kin of married woman, when put to, 90
- to raise, there must be a gift of free disposable property, *ib.*, 91]

**EMBLEMENTS,**

- when devisee takes, 151

**ENDOW**

- a charity, gift to, 308

**ENJOYMENT,**

- postponement of, does not affect vesting, 402
- legatee having vested interest is entitled to, at twenty-one, 461
- specific, by tenant for life (see **CONVERSION**), 199—203

**“ENTITLED,”**

- meaning of, in clause of exclusion, 222, 223
- gift over upon death before, whether it refers to vesting, 521
- meaning of, in shifting clauses, 549

**ENTIRETIES,**

- tenants by, how created, 322

**ENUMERATION,**

- of particulars, effect of
  - in making gift specific, 112
  - in restricting large words, 182—186
  - in giving tenant for life specific enjoyment, 201, 202

**EN VENTRE,**

- child (see **CHILD EN VENTRE**), 237—239, 247, 249, 334

**EQUITY**

- to settlement, not out of property held by entireties, 322

**EQUIVOCATION,**

- when it arises, 210—212
  - when two persons equally answer same description, 210
  - when part of a description applies equally to two persons and the rest to no one, *ib.*
  - father and son may both equally answer description, 211
  - immaterial that will on the face discloses an, *ib.*
  - does not arise between two antecedents in the same will, *ib.*
  - may be explained by the will itself, *ib.*, 212
  - whether it arises between nephews proper and wife's nephews, 212
  - does not arise where part of a description applies to one person, part to another, *ib.*, 213

**ERASURES**

- in will, 32—34
- revoking effect of, 39

**ESCHEAT,**

- will of lands liable to, 71
- whether it reunites freeholds with manor, 154
- who entitled in case of, 612

**ESTABLISH,**

gift to, a charity, 308

**ESTATE,**

at A. and of A., what passes under devise of, 96—98  
 when it will pass realty, 157, 158  
 devise of, whether it executes a general power over realty, 170, 171  
 when it will pass the fee, 325

**ESTATE AND POWER,**

distinguished, 355, 375, 376

**ESTATE PUR AUTRE VIE,**

limited in tail, whether devisable, 71, 72  
 whether fee passes without words of limitation, 325  
 devise on failure of issue of an, 546  
 descent of, 612, 613

**ESTATE TAIL, 329—335**

heirs explained by the context as equivalent to heirs of the body, 323  
 devise to several and their heirs successively, *ib.*, 324  
 effect of gift over in default of heirs to a collateral heir, 324  
 effect of gift over in default of issue on prior devise in fee, *ib.*  
 words of limitations proper to pass, 329—332  
     devise of copyholds to A. and heirs of his body, 329  
     heirs of the body or issue, *ib.*  
     heirs male, heirs lawfully begotten, *ib.*  
     effect of words of limitation superadded, *ib.*  
         distribution superadded, *ib.*  
     "the elder son to be preferred to the younger," *ib.*  
     the heirs of the body must be the heirs of the ancestor, *ib.*, 330  
     heirs of the body and heirs on the body of the wife begotten, 330  
     limitation to heirs of body of persons who may marry, *ib.*  
     devise to A. or the heirs of his body, 331  
     devise to A. and his issue passes an estate tail, *ib.*  
     effect of words of distribution, *ib.*, 332  
     devise to several and their issue and their heirs as tenants in  
         common, 332  
     by the operation of the rule in *Wild's case* (see *WILD'S CASE*),  
         334, 335  
     by the operation of the rule in *Shelley's case* (see *SHELLEY'S CASE*),  
         335—345  
     by implication (see *IMPLICATION*), 563, 564  
     by the *cy près* doctrine (see *CY PRÈS*), 441—443  
 words creating an, in realty give absolute interest in personalty, 371  
 gift over of personalty after estate tail, 473  
 cannot be created in an annuity, 388  
 condition against marriage annexed to, void, 453  
     barring void, 460  
 conditions to determine, 461

**ESTATES OF TRUSTEES (see TRUSTEES), 346—353****ET CÆTERA,**

what it passes, 182

**EVERY,**

effect of, in a direct gift, 318  
 gift over on death of, construction of, 394

**EVIDENCE,**

- of testamentary intention, 11
- declaration as to execution not admissible, 23
- as to what constitutes will, 32
- alterations, *ib.*
- of contents of lost will, 47
- of trust when admitted, 64
- of secret trust, *ib.*, 65
- of testator's meaning, what admitted, 95
- that two instruments duplicates, 116
- of meaning of description of persons, 207
- nicknames, initials, 203
- patent ambiguity, *ib.*
- blanks, *ib.*
- in cases of equivocation, 210, 211
- See *In bonis Drake*, 50 L. J. P. 48.
- of marriage by reputation, 227
- of intention to benefit certain children, 242
- to rebut satisfaction, 586
- entries after date of will, 597
- that advances intended to be a gift, 598
- to support executor's title to residue, 615

**EXCEPTION**

- of property out of devise, what it includes, 161
- in fee, passes fee, 327
- from a residue, for particular purpose, 189

**EXCHANGE,**

- before date of will of thing specifically given, effect of, 102
- power of, whether inserted in settlement, 561

**EXCLUSION,**

- clauses of, 222, 223
- from being next of kin, 278, 279, 610—612

**EXECUTION**

- of powers (see **POWERS**), 170—181

**EXECUTORS,**

- special, of parts of property, 76
- delegation of power to appoint, *ib.*
- appointed by several instruments, *ib.*
- according to tenor, 77
- See *In bonis Love*, 7 L. R. Ir. 178
- used as a word of purchase, 286—289
- gift to A. or his, whether it goes to next of kin, 286, 287, 604
- whether they take in trust or beneficially, 287
- gift to, in respect of office, *ib.*
- what is an acceptance of the office, *ib.*
- when the executor is entitled, though he does not act, *ib.*, 288
- duration of annuity to, for his trouble, 396
- gift of residue to, whether beneficial or in trust, 283
- whether gift to, is a gift to a class, 607
- used as a word of limitation of realty, 323
- of personality, 370
- when they take beneficially, *ib.*
- when they have implied power of sale over real estate, 350—353
- land directed to be sold to pay debts and legacies, 360
- to create a mixed fund for division, *ib.*
- direction to sell and divide proceeds, *ib.*
- effect of Lord St. Leonards' Act, *ib.*, 361

**EXECUTORS—continued.**

- devise to trustees subject to charge of debts, 361
- beneficial devise subject to debts to a person who is executor, *ib.*
- similar devise to person not executor, *ib.*
- effect of a general charge of debts, 362, 363
- direction to, to sell lands, effect of, 355, 356
  - copyholds, 356
- when acting, may sell, *ib.*
- power of sale to, *ib.*
- whether it survives, *ib.*
- whether executor of, can sell, 357
- power of, over personalty, 364
- lease by, *ib.*, 365
- cannot carry on business without power, 366, 367
- appointment of, whether it executes a general power, 179
- when lapsed legacy goes to, 601, 603, 604
- when they take residue undisposed of, 614—617
  - effect of Lord St. Leonards' Act, 613, 614
  - contrary intention, 613
  - the Act does not apply where there are no next of kin, 614
  - they do not take lapsed or void legacies, *ib.*
  - nor residue given on trust, *ib.*
  - nor when they are treated as trustees, *ib.*
  - nor where there is an intention to dispose of the residue not carried out, 615
- legacy to a sole executor makes him trustee, *ib.*
- unless the legacy can be accounted for as an exception out of a larger gift, 616
- equal legacies to several executors make them trustees, *ib.*
- effect of unequal legacies, *ib.*
- legacy to an executor for his trouble converts all into trustees, 617
- executors appointed for special reasons take on trust, *ib.*

**EXECUTORY INTERESTS,**

- and remainders distinguished, 474, 475
- (See GIFTS OVER, DIVESTING.)

**EXECUTORY TRUST, 556—562**

- for A. and her children, how executed, 317
- whether children take jointly or in common, 321
- what is an, 556
- direction to purchase lands to be held on trusts of another instrument is not, *ib.*
- distinction between marriage articles and wills, 557
- how far rule in *Shelley's case* applies to, *ib.*, 558
- direction to settle on A. and the heirs of his body, 557
  - A. for life, remainder to his heirs, *ib.*
- effect of gift over, if first taker dies without issue, *ib.*
- direction to make a strict entail, 558
- direction to settle property to go with a title, *ib.*
- effect of words as far as rules of law permit, *ib.*
- direction to settle upon marriage, 559
- how executed, *ib.*, 560
- in what cases tenant for life will be unimpeachable for waste, 560, 561
- settlement to the separate use will be with restraint on anticipation, 561
- what powers will be inserted in execution of, *ib.*, 562

**EXONERATION,**

- of specific legacies, 124—126
  - from liabilities created by the testator, 124, 125
  - incident to the thing, 125, 126



**EXONERATION**—*continued*.

- of mortgaged property, 126—133
  - devise of land "subject to" the mortgage, 126
  - effect of charge of the mortgage on the land in distinct sentence, 127
  - Locke King's Act, *ib.*
  - the amending Acts, 128
    - Crown taking in default of next of kin is within the Act, *ib.*
    - heir by descent from person dying after December 31, 1854, not entitled to exoneration, 128, 129
  - copyholds within the Act, 129
  - lands on trusts for sale not within the Act, *ib.*
  - apportionment of mortgage, *ib.*
  - leaseholds whether within Acts, *ib.*
  - mortgages by deposit are within the Act, 130
  - general charge is not, *ib.*
  - nor covenant to pay a mortgage, *ib.*
  - lien on lands purchased by testator is, *ib.*
  - effect of general direction to pay debts, *ib.*, 131
  - direction to pay debts out of personal estate, 131
    - mortgages out of an insufficient fund, 132
  - what proportion of mortgage mortgaged lands bear, *ib.*
  - mortgaged land devised to several, *ib.*, 133
  - collateral mortgages, 133
  - charge as between land given by deed and devised, *ib.*
- of personalty from payment of debts, 638—643
  - by express words, 638
  - whether gift over of the fund is necessary, *ib.*
  - whether personalty exonerated is exonerated in favour of next of kin, 639
- on the general context,
  - charge of debts on realty will not effect, *ib.*
  - whether devise on condition of paying debts will effect, *ib.*
  - effect of express charge of certain debts on personalty, *ib.*, 640
  - gift of realty and personalty on trust to pay debts, 640
    - to convert and pay debts, *ib.*
  - discretion of trustees to sell realty, *ib.*
  - realty to be sold and fall into personalty, *ib.*
  - income of realty and personalty charged with debts, *ib.*, 641
  - gift of residue of real and personal estate charges realty but does not exonerate personalty, 641
  - charge of testamentary expenses on realty, where personalty is specifically given, *ib.*
  - legacies charged on land where personalty specifically given, *ib.*
  - effect of specific gift of personalty to executor, 642
  - effect of charge of particular debts on realty, *ib.*
  - gift of land after payment of debts, 643

**F.****FAILURE,**

- of prior gift through want of persons to take, where the gift over is on failure of those persons in a particular way, 481—483
- of prior gift by lapse, will not make invalid gift over, valid, 460, 478

**FAILURE OF ISSUE.** (See **DEATH WITHOUT ISSUE**.)**FALSA DEMONSTRATIO NON NOCET,**

- application of the maxim (see **DESCRIPTION**), 99, 100, 209, 211

**FAMILY,**

- meaning of, 266—268
- in devises, 266
- direction to secure to, *ib.*
- in bequests means children, *ib.*, 267
  - See *In Re Mulqueen*, 7 L. R. Ir. 127
- whether illegitimate child included, 267
- when it means next of kin, *ib.*
- may include husband or wife, *ib.*
- power to appoint to, *ib.*
- when gift to, will be void for uncertainty, *ib.*
- gift to several families goes *per capita*, 268
- precatory trust for, 380

**FARM,**

- will pass a leasehold as well as a freehold part, 165

**FARMING STOCK,**

- meaning of, 151

**FEE SIMPLE,**

- what words will pass, 323—328
  - devise to A. and his heirs, 323
  - A. and his lawful heirs, *ib.*
  - A. and his executors, *ib.*
  - when heirs equal to heirs of body, *ib.*
  - gift over in default of heirs to collateral heir, 324
  - gift over in default of issue, *ib.*
- when it will pass without words of limitation, 325—328
  - in wills before the Wills Act,
    - words property or estate, 325
    - recital of intention to dispose of all his estate, *ib.*
    - words moiety, part, or share, *ib.*
    - charge upon the devisee, 326
    - discretionary trust imposed on devisee, *ib.*
    - charge upon the land generally, *ib.*
    - express estate for life not enlarged, *ib.*
    - gift over upon death of devisee under twenty-one, *ib.*, 327
      - upon death under twenty-one without issue, *ib.*
      - upon death of the parent without children, *ib.*
    - devise of rents and profits or income, *ib.*
    - devise of specific sum, *ib.*
    - exception of property out of a devise in fee, carries fee, *ib.*
    - devise to trustee and his heirs in trust for A., *ib.*, 328
  - since the Wills Act, 328
    - contrary intention within the Act, *ib.*
    - by the operation of the rule in *Shelley's case* (see *SHELLEY'S CASE*), 335—345
    - when trustees take, 346—353
    - conditional, how created, 388
    - implication of (see *IMPLICATION*), 567—570

**FELONS,**

- wills of, whether valid, 18, 19
- personality vested in during sentence is forfeited, 93

**FINES FOR RENEWAL,**

- apportionment of, between successive interests, 648, 649

**FIRST**

- son, gift to a, whether it refers to order of birth, 219, 220

**FIRST AND SECOND COUSINS,**  
meaning of, 258

**FIRST HEIRS MALE,**  
when used as words of limitation, 342

**FOREIGN BONDS,**  
meaning of, 150

**FOREIGN CHARITY,**  
whether court will settle a scheme for, 301  
bequest to, of proceeds of sale of land in England, 310

**FOREIGN HEIR,**  
when put to election, 90

**FOREIGN PROBATE,**  
effect of, 67, 68

**FORFEITURE,**  
abolition of, 18, 19

**FRAUD,**  
probate conclusive as to, 22, 69  
of executor in assuming office, disentitles him to legacy, 288  
assumption of character by, 215

**FREE-BENCH,**  
what is an intention to dispose of widow's right to, 87—89  
whether barred by a general devise, 164

**"FREEHOLD LANDS,"**  
devise of, 97  
when it passes leaseholds, 166, 167

**FREEHOLDS,**  
effect of general devise on (see **GENERAL WORDS**), 161, 162

**FRIENDLY SOCIETY,**  
gift to, whether charitable, 291

**FRIENDS,**  
gifts to, 263, 268

**FROM AND AFTER,**  
effect of words, upon vesting, 403

**FUNDS,**  
gift of money in the, 147

**FURNITURE,**  
in a house, gift of, when deemed, 121, 122  
what passes under, 150, 151

**FUTURITY,** words of,  
not necessary, to include future illegitimate children, 237  
effect of, in excluding children already born, 240  
——— on ascertaining the class to take, 251—253  
——— in ascertaining the class of next of kin, 282, 283

(G.)

**GAVELKIND LANDS,**

devise of, to the heir of a person, 269

devise of, to A. and his heir, 323

**GENERAL BEQUEST,**

effect of, upon property subject to a power, 178

——— upon real estate sold, *ib.*

(See GENERAL WORDS.)

**GENERAL LEGACY,**

what is, 104—109

interest on, 137—142

**GENERAL POWERS,**

execution of, 170—181

**GENERAL WORDS,**

effect of, 161—181

1. on freeholds prior to the Wills Act, 161

effect of the Wills Act, *ib.*

intention not to pass after-acquired freeholds, 162

force of the word "now," 98, 162

2. on reversions, 162—164

devise of lands not settled, 162

where the limitations are inapplicable to the reversion, 163

3. leaseholds for lives, 164

4. on copyholds, *ib.*

5. on leaseholds for years, 165—167

intention not to pass them, 166

6. beneficial interest in a mortgage, 167

7. on trust and mortgage estates, 168—170

effect of a charge of debts, 169

——— words of benefit, *ib.*

8. on powers, 170—181

as regards realty, 170, 171

——— personalty, 171, 172

power vested in a married woman, 172

effect of the Wills Act, 176—181

power created after the date of the will, 179

**GIFTS OVER,**

in default of heirs to collateral heir, effect of on prior devise in fee, 324, 325

in default of issue, on prior devise in fee, *ib.*

——— for life, 371

——— on the rule in *Shelley's case*, 338, 343

effect of, in passing the fee under prior devise, 326, 327

after death of survivor, effect of in giving survivor a life interest by implication, 393—396

(See SURVIVORSHIP, IMPLICATION OF.)

upon death before time of vesting upon contingent devise, 403

——— meaning of the word vested, 408

——— upon contingent bequests, 416—419

effect of, upon gift to children who survive their parents, 421

if none of the class survive the contingency, upon which the gift to the class takes effect, *ib.*

of property given to charity, cannot be too remote, 424

effect of, where condition is impossible, 450

GIFTS OVER—*continued.*

- whether necessary to make condition subsequent effectual, 451
- effect of, upon doctrine of conditions *in terrorem*, 454—456
- if legatee disposes of his interest, are void, 460
- if legatee dies intestate, are void, *ib.*
- if prior gift is void at law, *ib.*
- upon bankruptcy, alienation or insolvency, 461—466
  - (See CONDITIONS REPUGNANT.)
- what cannot be the subject of, 472, 473
  - remainder in chattels, 472
  - consumable articles, *ib.*
  - absolute interests cannot be given in succession, 473
  - do not become valid by lapse, *ib.*
  - of so much as legatee does not dispose of, *ib.*
  - of what remains after payment of debts of the legatee, *ib.*
  - after life interest with power of disposition, *ib.*, 474
- take effect if the events happen though the donees over may be unable to
  - take, 478, 479
  - to survivors, do not divest prior gift if there are no survivors, 479
  - in certain events of a life interest, destroy prior interest only so far, *ib.*, 480
- construction of,
  - in different events to different persons, where both events happen, 480
  - the exact event must happen, *ib.*, 481
  - if A. dies in the testator's lifetime, where A. and the testator die simultaneously, 481
  - when the events which happen include the events upon which the gift over is limited to take effect, *ib.*, 482
- in the event of a legatee dying under twenty-one, 482
  - where the gift is to a class, *ib.*, 483
- upon death, treated as a contingent event, 483—485
  - in case of death of A., 483, 484
  - at the death of A., 484
  - after a life interest, 485
  - where the gift is to executors for their trouble, *ib.*
  - whether same rules apply to realty, *ib.*
- upon death coupled with a contingency, 485—490
  - upon death without issue, not confined to death before the testator, 485, 486
  - whether the gift is immediate or future, *ib.*
  - intention to limit the period of defeasibility, 486
  - where the donees over take through a trust which determines at a certain time, 487
  - where all the dispositions refer to the period of distribution, *ib.*, 488
  - legatee to have free control at a certain time, 488
  - ulterior gifts over only to take effect within a given time, *ib.*
  - effect of gifts over in several events, one of which must happen, *ib.*, 489
  - intention to give indefeasible interests, 489
  - after contingent gift, where the donees over are children, *ib.*, 490
  - ultimate gift over restricted because prior gifts over are restricted, 490
  - upon marriage without consent restricted to twenty-one, *ib.*
- substitutional (see SUBSTITUTION), 491—501
- to survivors (see SURVIVORS), 502—518
- upon death without issue to survivors, 511, 514—516
- whether applicable to accrued shares, 516—518
- upon death before vesting (see VESTING), 519, 520

**GIFTS OVER—continued.**

- upon death before payment (see PAYMENT), 520—524
  - \_\_\_\_\_ receipt (see RECEIPT), 524—526
  - \_\_\_\_\_ sale completed, 526
  - \_\_\_\_\_ execution of trusts of will, *ib.*
  - \_\_\_\_\_ unmarried, 527
    - \_\_\_\_\_ and without issue, *ib.*
  - \_\_\_\_\_ without having children (see HAVING), 532, 533
  - \_\_\_\_\_ leaving children, *ib.*
  - \_\_\_\_\_ issue (see DEATH WITHOUT ISSUE), 534—547

**GOODWILL,**  
bequest of, 151

**GRANDCHILDREN,**  
not included in gifts to children, 239  
will not include great grandchildren, 259

**GROUND RENTS,**  
pass reversion, 155

**GUARDIAN,**  
testamentary under 12 Car. II. c. 24, 77—79  
infant cannot appoint, 78  
of illegitimate children, *ib.*  
by what words appointed, *ib.*

**H.**

**HALF BLOOD,**  
admitted as next of kin, 275

**HAVING**  
children, construction of gift over upon death without, 532, 533  
issue, gift over upon death without, where it imports an indefinite failure,  
541

**HEIR,**  
when put to election, 89, 90  
limitation to the, of the tenant for life, 342  
next or first, *ib.*  
where the heir will take by purchase, *ib.*  
limitation to the heir for life, *ib.*  
acknowledgment of person as, 270  
title of, to accumulations released by statute, 448  
takes undisposed of interests in realty to be converted, 197, 198  
how he takes property to be converted, 198, 199  
title of, to realty undisposed of, 610, 611  
directions excluding, effect of, *ib.*  
resulting trust in favour of (see RESULTING TRUSTS), 608, 609  
who entitled in default of, 612  
See HEIRS.

**HEIRLOOMS,**  
bequest of personalty as, 552—555  
executory trust of personalty to go as, 558, 559

**HEIRS,**

- I. meaning of, as a word of purchase, 269—271
  1. as regards realty,
    - devise of Borough English or Gavelkind lands, 269
    - when it means heir apparent or presumptive, *ib.*
    - acknowledgment of a person as heir, 270
    - devise to heirs of a particular name, *ib.*
    - whether the heir male must trace his descent through males *ib.*, 271
    - ex parte materna*, 271
  2. bequests of personalty to, 273—275
    - primâ facie* means heir at law, 273
    - bequest to A. for life, then to his heirs, *ib.*
    - when it means next of kin, *ib.*, 274
    - when used as equivalent to executors, 274
    - when used to denote substitution, *ib.*
    - substitutional bequests to heirs, *ib.*
    - when it means issue, *ib.*, 331
    - when heirs means next of kin, the statute fixes the proportions as well as the persons, 275
    - bequest to heirs or next of kin, *ib.*
  3. when the class is to be ascertained (see CLASS), 280—283
- II. used as a word of limitation, 323—325
  1. in the case of realty,
    - devise to A. and his heirs, 323
    - and his lawful heirs, *ib.*
    - or his heirs, 331
    - explained by the context as equivalent to heirs of the body, *ib.*
    - gift over in default of, to a collateral heir, *ib.*, 324
    - effect of gift over in default of issue, 324
    - when the ancestor takes a life interest, 335—345
    - (See *SHELLEY'S CASE*, rule in).
  2. bequests of personalty, 371, 372
    - gift to A. and his heirs, 371
    - for life, and then to his heirs, *ib.*, 372
    - of annuity to A. and his heirs, 388
    - or his heirs, 393

**HEIRS LAWFULLY BEGOTTEN,**

devise to A. and his, creates a tail, 329, see 323

**HEIRS MALE,**

devise to A. and his, creates a tail, 329  
devise to, 270, 271

**HEIRS OF THE BODY,**

- I. meaning of, when used as a word of purchase, 269—271
  - heirs of the body of a particular name, 270
  - whether the devisee must be very heir, *ib.*
  - rule in *Mandeville's case*, 271, 272
  - when heirs of the body means children, 272
  - bequest of personalty to, 274
- II. when used as a word of limitation, 329—332
  1. in the case of realty,
    - effect of words of limitation superadded to devise to A. and the heirs of his body, 329
    - effect of words of distribution superadded, *ib.*
    - the heirs must be the heirs of the ancestor, 330
    - heirs of the body and on the body of the wife begotten, *ib.*

**HEIRS OF THE BODY—continued.**

- devise to heirs of the body of several ancestors who may intermarry, 330
- devise to heirs of the body of the ancestor by a second wife, *ib.*
- devise to wife and heirs of her body by the testator, *ib.*, 331
- devise to A. or the heirs of his body, 331
- limitation to. after prior life estate to the ancestor, 335—345
  - (See *SHELLEY'S CASE*, rule in.)
  - when explained by the testator to mean children, 340, 341
- 2. in the case of personalty, 371, 372
  - gift to A. and the heirs of his body, 371
  - gift to A. for life, remainder to heirs of his body, *ib.*
  - intention to create a succession of estates, *ib.*, 372
  - words of distribution superadded, 372
  - where realty and personalty are given together, *ib.*, 373
- gift of annuity to A. and the heirs of his body creates base fee, 388
- gift over in default of, when they import an indefinite failure, 534, 535, 541—547

**HOTCHPOT CLAUSES,**

- construction of, 590—592
- directions to deduct advances from shares of legatees, 597—600
  - effect of recital as to amount of advance, 597
  - sum not payable till after death not deducted, 598
  - effect of bankruptcy of legatee after advance, *ib.*
  - when clause ceases to operate, 599
  - whether it applies to lapsed share, *ib.*
  - interest on advances when to be allowed, *ib.*
- implication of, under powers, *ib.*, 600
  - appointment "as and for her share," 600
  - in lieu of all claims, *ib.*
  - clause of accruer, *ib.*

**HOUSE,**

- or messuage, meaning of, 155
- gift of things in, 121, 122, 150, 151, 186

**HUSBAND,**

- and wife, gifts to, 217, 218
- when included in family, 267
- will not take as next of kin by statute, 275, 276
- and wife when tenants by entireties, 322
- effect of separate use on rights of, 466, 467

**I.****IGNORANCE,**

- of condition no excuse, 451

**ILLEGITIMATE CHILDREN, 226—239**

- guardians of, 78, 79
- whether law of domicile of parent applies, 226, 227
- not included under children, 226
- in what cases they may take, 227
- when there is no possibility of legitimate children, *ib.*



**ILLEGITIMATE CHILDREN**—*continued.*

- what is sufficient evidence of intention to include illegitimate children, 228—231
- whether legitimate and illegitimate children can take together under the same description, 233
- whether future illegitimate children can take, 233—236
- whether express reference to reputes is necessary, 236
- whether express words of futurity are necessary, 237
- illegitimate children born after the testator's death can in no case take, *ib.*
- whether illegitimate child *en ventre* at the date of the will can take, *ib.*, 238
- whether illegitimate child *en ventre* at the death can take, 238, 239

**IMMOVEABLES,**

- will of, by what law governed, 1

**IMPEACHMENT OF WASTE,**

- when tenant for life without, under executory trust, 560, 561

**IMPLICATION, 563—574**

- class to take by, from power how fixed, 249—251
- of survivorship between annuitants, 394—396
- of estates tail, 563, 564
  - by gift over in default of issue after prior devise indefinitely for life or in fee, 371, 563
  - where the failure of issue might constructively be limited, 563
  - gift over in default of issue of person taking nothing under the will, *ib.*
  - an estate is implied in remainder, 564
  - as between father and son an estate tail is implied in the father, 333, 564
- of life estates in the case of realty, 564, 565
  - devise to heir at law after death of A. gives him a life estate, 564
  - devise to stranger at death of A. raises no implication, *ib.*
  - devisees over must be heir at the time of the devise, *ib.*
  - devise at death of A. to one of several co-heiresses, *ib.*
    - to heir and others, *ib.*
  - whether express devise to A. bars implication, 565
  - distributive construction of gift at death of A., *ib.*
  - mere postponement of vesting raises no implication, *ib.*
  - effect of a residuary devise, *ib.*
- of life interests in personalty, 565—567
  - gift of personalty to next of kin at death of A., 565, 566
  - life interest implied in marriage settlement, 566
  - intention to give life interest, *ib.*
  - effect of residuary bequest, 567
  - gift if A. dies under twenty-one to B. raises no implication, *ib.*
- of absolute interests, 567—570
  - devise to A. till twenty-one, and if he dies under twenty-one, over, 567
  - general intention that devisee was to take absolutely, *ib.*, 563
  - gift to A. till twenty-one for himself and another, 563
    - A. absolutely, and if he dies without children, over, *ib.*
    - A. for life, and if he dies without children, over, *ib.*, 569
    - A. to dispose of at his death among a class, 569
- of interest under power where power not exercised, 570
  - bare power to appoint to A., *ib.*
  - power to select some of a class, *ib.*
  - large discretion not exercised, *ib.*
  - power in nature of trust, *ib.*
  - power to tenant for life, *ib.*

**IMPLICATION—continued.**

of cross-remainders, 571—573

devise to several in tail, followed by gift in default of such issue in tail, 571

immaterial whether the gift is limited as a remainder or reversion, *ib.*

gift over in default of issue living at ancestors' deaths, *ib.*

whether cross remainders limited in certain events, *bar* implication, *ib.*, 572

cross-remainders implied between persons taking different interests, 572

\_\_\_\_\_ tenants for life, *ib.*

\_\_\_\_\_ families where the limitations are for life, with remainders to children, *ib.*

not implied so as to divest vested interests, *ib.*, 573

whether cross-limitations may be implied where contingent interests are given over if all the legatees die before vesting, 573

by reference to a prior gift, 554

by recital, 574

that a person is entitled under another instrument, *ib.*

of a supposed gift by the will, *ib.*

gift in addition to a supposed gift, *ib.*

there must be nothing to which the recital can refer, *ib.*

recital will not cut down a prior gift, *ib.*

of hotchpot clauses, 599, 600

**INACCURATE DESCRIPTION** (see **DESCRIPTION, MISTAKE**), 99—103, 209—214, 297

**IN ADDITION,**

whether gift, is liable to restriction of prior gift, 117, 118

gifts, to prior supposed gift, 574

**IN CASE OF DEATH,**

gift over (see **GIFTS OVER**), 483—485

**INCLUSION**

of particular things in a residue, effect of, 183, 184

**INCOME,**

gift of, for maintenance, vests absolutely as it accrues, 137

of severed fund passes to legatee, 141

on share of appointed fund passes; *Long v. Ovenden*, 16 Ch. D. 691

specific devise or legacy carries, 133, 134

contingent residuary bequest carries, 136

under gift to class, 137

joint tenancy severed as regards, as it accrues, 318

gift of, when it passes the absolute interest, 374, 375

—— part of annual, of a fund, effect of, 392, 393

—— intermediate, effect of upon vesting, 412—415

See **CAPITAL AND INCOME, RENTS AND PROFITS, PROFITS, TENANT FOR LIFE AND REMAINDERMAN.**

**INCOME TAX,**

gift free from, 143

**INCONSISTENCY,**

in description (see **DESCRIPTION**), 209—214

of two inconsistent gifts, the latter prevails, 578

devise of same property to two persons in fee, *ib.*

devise of same property with and without words of limitation, *ib.*

gifts of whole estate and residue, 579

**INCONSISTENCY—continued.**

gifts of residue and remainder, 579  
 gift of all followed by gifts of part of testator's property, *ib.*  
 argument in favour of revocation is stronger as between will and codicil,  
*ib.*, 580  
 (See REVOCATION, 575—578.)  
 (See CHANGING AND SUPPLYING WORDS, 581—584.)

**INCORPORATION,**

of documents in will, 60—63  
 rule as to, 60  
 document not in existence, *ib.*  
 document written between date of will and codicil, 61  
 memorandum on back of will, *ib.*  
 ——— referring to contents of will, 62  
 reference to will, *ib.*  
 ——— by date, 63  
 effect of incorporated paper, 62  
 of entries subsequent to will, 597

**INCREASE,**

in value of specific bequest passes with it, 101  
 ——— of rents and profits given to charity, 299—301

**INDEFINITE FAILURE OF ISSUE,**

what imports, 541—547. (See DEATH WITHOUT ISSUE.)

**INDEMNITY CLAUSE,**

construction of, 369

**INFANT,**

cannot make will, 15  
 soldier or seaman under 14 may make will, 52  
 cannot appoint guardians, 78  
 interest on legacy to, when payable, 138—141  
 consent by, to exercise of power of sale, 257  
 maintenance of, 367—369  
     discretion of trustees when not controlled, 367  
     allowance for past, 368

**IN LIEU,**

gift, subject to conditions of original gift, 118

**INSOLVENCY,**

meaning of, 464, 465

**INSTRUCTIONS**

for will, when effective, 11

**INTEREST IN LAND,**

within Mortmain Act, what is, 302—306

**INTERLINEATIONS,**

rules as to, 32—34

**INTERMEDIATE RENTS, 133—137. (See RENTS.)****IN TERROREM,**

conditions, what are, 454—456  
 doctrine of, whether it applies to conditions precedent, 455, 456

## INTEREST,

- when it passes with capital, 133—137
- on legacies, 3, 137—142
- legacy charged on land, 137
- payable out of proceeds of sale, *ib.*
- where no time of payment is fixed, runs from the end of a year, *ib.*, 138
- on legacy payable out of assets "when received," 138
- on legacy charged upon personality and a reversion in realty, *ib.*
- on legacy charged on a fund wholly reversionary, *ib.*
- when the testator is *in loco parentis*, *ib.*, 139
- when the legatee is an infant and maintenance is given, 139
- on legacy in satisfaction of a debt, *ib.*
- on legacy payable at a future day, *ib.*
- when a time of payment is fixed, runs from then, *ib.*
- right of personal representatives, *ib.*
- when the legatee is an infant and the testator is *in loco parentis*, 140
- when there is a general intention to provide maintenance, *ib.*
- under Lord Cranworth's Act, *ib.*, 141
- on severed fund, 141
- on share of appointed fund passes; *Long v. Orenden*, 16 Ch. D. 691
- future gift of principal and interest, *ib.*
- when the legacy is given over upon a contingency *ib.*, 142
- gift of, 141
- on legacy for life with remainders, 142
- on arrears of annuities, *ib.*
- effect of gift of intermediate, on vesting, 411—417
- on advances, what allowed, 599

## INTESTACY,

- effect of reference to, 276, 277
- gift over upon, 460
- who entitled in case of, 612, 613

## IN THE SAME MANNER,

- gifts given, as prior gifts, 554

## INVESTMENT,

- consent to, when to be given, 365

## ISSUE,

- I. Used as word of purchase
  - gifts to parents and issue, 254
  - includes all descendants, 259
  - intention to keep estates in a single line, *ib.*
  - in what case it means children, 259, 260, 340, 341
  - of issue means issue of children, 260
  - lawfully begotten, 261
  - one remainder to children another to issue, *ib.*
  - issue in different gifts, *ib.*
  - successive limitations of same property, *ib.*, 262
  - when the class is to be ascertained
    - when the gift is substitutional, 262
    - in the case of cross-remainders, *ib.*
    - when the gift is in remainder, *ib.*
  - application of rule in *Mandeville's case*, 271, 272
- II. Used as a word of limitation
  - in the case of realty
    - devise to A. and his issue, 331, 332
    - effect of words of distribution superadded, 332
    - rule in *Wild's case* applies to a devise to several and their issue and their heirs as tenants in common, *ib.*

ISSUE—*continued*.

- devise to the issue of a tenant for life, 343—345. (See *SHELLEY'S CASE*, rule in.)
- in the case of personality
  - gift to A. and his issue, 373
  - effect of gift over in default of issue, *ib.*
  - where realty and personality are given together, *ib.*
  - intention not to use it as a word of limitation, *ib.*
  - gift to A. for life, remainder to his issue, 374
- III. Gifts over upon death without, 534—547

J.

JEWS,

- position of, as regards charitable gifts, 292

JOINT AND SUCCESSIVE INTERESTS, 314—322

JOINT TENANCY,

- property held in, not devisable, 72

JOINT TENANCY AND TENANCY IN COMMON, 317—322

- what creates joint tenancy, 317, 318
  - whether interests of joint tenants must vest at same time, *ib.*
  - all and every, 318
  - devise to two in tail who may marry, *ib.*
  - appointment to object and non-object of power, *ib.*
  - severance of, as regards income accrued, *ib.*
- joint life estates, several inheritances, *ib.*, 319
  - devise to several in tail who cannot marry, 318
  - \_\_\_\_\_ and heirs of their respective bodies, 319
  - \_\_\_\_\_ and their respective heirs, *ib.*
- what creates tenancy in common, 320—322
  - Court leans to tenancy in common, 320
  - "to be divided," "equally," "between," "respectively," *ib.*
  - share, participate, *ib.*
  - where some take vested, some contingent interests, *ib.*
  - incidents inconsistent with joint tenancy, *ib.*, 321
  - gift over on death without issue to member of the class, *ib.*
  - power to appoint in tenancy in common, 321
  - executory trust, *ib.*
  - direction to secure, *ib.*
  - issue substituted for parents take jointly, *ib.*
  - unless there are words of severance applicable to issue, *ib.*
  - as regards issue substituted joint tenancy is severed, *ib.*, 322
- See SURVIVORSHIP, IMPLICATION OF, BETWEEN ANNUITANTS, 393—396

JOINT WILLS,

- whether valid, 12

L.

LAND,

- description of, in devises, 96—100
  - See DESCRIPTION.
- devise of, is specific, 110
  - \_\_\_\_\_ on trust to sell and divide, *ib.*
  - \_\_\_\_\_ where it carries rents, 133—137

**LANDS NOT SETTLED,**  
devise of, 162—164

**LAND TAX**

on land in mortmain, gift to redeem, 311

**LAPSE,**

whether a gift to A. or his executors will fail by, 286, 287, 604  
of gift to charity, 296, 297  
will not make a gift over bad in itself valid, 326  
effect of, upon gifts over, 473, 520, 521  
doctrine of, 601  
whether codicil gives lapsed legacy to executors of legatee, *ib.*  
gift to tenants in common by name, *ib.*  
applies to a power of appointment exercised by will, 602  
whether legacies to creditors are subject to, *ib.*, 603  
declaration against, effect of, 603  
interests of persons to take in default will not fail by death of donee of power, *ib.*  
nor interests in remainder by death of tenant for life, *ib.*, 604  
charges will not fail by death of devisee charged, 604  
effect of the Wills Act upon, *ib.*, 605  
doctrine of, in cases of gifts to a class, 605  
direction to settle a share, *ib.*, 606  
person incapable of taking at the death is not a member of the class, 606  
appointment to objects and non-objects, *ib.*  
revocation of share of member of the class will not cause, *ib.*, 607  
——— given to individual, 607  
what is a gift to a class, *ib.*  
gift to persons "before-named" is not, *ib.*  
gift to the five daughters of A., *ib.*  
whether gift to a class and an individual, where the latter dies, lapses as regards his share, *ib.*, 608  
See **RESULTING TRUSTS**, 608, 609

**LAPSED LEGACIES,**

where they will not pass under residue, 189

**LAWFUL HEIRS,**

devise to A. and his, creates fee, 323

**LEADING WORDS**

of description, what are, 100, 210—214

**LEASE,**

acceptance of new, whether it adeems, 122, 123  
trustees cannot grant, 365  
executor may, *ib.*  
with option to purchase bad, *ib.*, 366  
of several properties together, 366  
power of leasing not accelerated, *ib.*  
bequest of, by what law governed, 1, 424

**LEASEHOLDS FOR LIVES,**

effect of general devise on, 165, 166

**LEASEHOLDS FOR YEARS,**

will of, governed by *lex loci*, 1  
whether within Locke King's Act, 129  
are not within Statute of Uses, 349  
effect of general devise on, 165—167  
what words will pass them, 166  
devised for life with remainders, effect of, 472

- LEASEHOLDS, RENEWABLE**,  
conversion of, into fee simple, effect of, 206
- LEASING POWER**,  
effect of, on devise to trustees in fee, 351  
what is a general, *ib.*  
whether included in usual powers, 561
- LEAVING CHILDREN**,  
construction of gift over upon death without, 532, 533
- LEAVING ISSUE**,  
gifts over upon death without, when they import an indefinite failure, 540
- LEGACIES**,  
when payable, 137  
for life with remainder, 142  
meaning of the word  
applies primarily to personalty, 152  
when it refers to realty, *ib.*, 153  
includes annuities, 153  
interest on (see **INTEREST**), 137—142  
abatement of (see **ABATEMENT**), 620—622  
specific (see **SPECIFIC LEGACY**), 104—113  
to be applied for benefit of legatee, 386
- LEGACY DUTY**,  
what is a gift free from, 143  
on charitable legacy can only be paid out of pure personalty, 302  
table of (see **APPENDIX**), 651
- LEGAL ESTATE**,  
whether it passes under securities for money, 143  
money on security, 149  
in trust and mortgage estates, when it passes by general words, 168—170  
whether devise to a college carries, 311  
whether devise on secret trust for charity carries, 313  
when trustees take (see **TRUSTEES**), 346—349
- LEGAL OR NEXT OF KIN**,  
meaning of, 275
- LEGAL REPRESENTATIVES**, 283—286. See **REPRESENTATIVES**.
- LEGATEE**,  
who may be, 92—94  
residuary, when takes realty, 152, 153, 194—197  
See *In re Methuen and Blore*, 16 Ch. D. 696; *Re Salter*, 44 L. T. N. S.  
603
- LIABILITIES**,  
right of legatee to exoneration from, 124—126
- LIFE INTEREST**,  
when joint, with several inheritances, 318, 319  
devise without words of limitation before Wills Act passes, 325  
effect of gift at the death of the legatee in creating, 473  
implication of (see **IMPLICATION**), 564—567
- LIMITATIONS**  
and conditions distinguished, 398  
what cannot be the subject of successive, 472, 473  
legal remainders and executory interests, 474, 475  
in remainder and subject to a term, 475, 476  
ulterior and alternative to void limitations, 435, 436, 476, 477  
when contingency runs through a series of, 477

**LIMITATION—WORDS OF,**

- what are to pass the fee, 323—325
  - devise to A. and his heirs, 323
  - A. and his lawful heirs, *ib.*
  - A. and his executors, *ib.*
- when the fee will pass without (see **FEE SIMPLE**), 325—328
- what are, to pass an estate tail (see **ESTATE TAIL**), 329—332
  - heirs of the body, issue, 329
  - heirs male, *ib.*
- words occasionally used as, 332—335
  - child, son, 332, 333
  - eldest son, 333
  - children (see **WILD'S CASE**, rule in), 333—335
- superadded,
  - in a devise to A. and the heirs of his body, 337
  - to several and their issue, 332
  - to A. for life, remainder to his heirs, 337, 342
  - inconsistent with descent pointed out by first words, 339, 344
  - when the limitation is to the *heir* of the tenant for life, 342
  - when the limitation is to the issue of the tenant for life, 342—345
- in bequests of personal estate, 370—374
  - executors, 370
  - heirs and heirs of the body, 371, 372
  - issue, 373, 374
- when the word survivors is used as, 502
- effect of, upon gifts in default of issue to survivors, 546

**LINEAL HEIR MALE,**

- must trace descent through males, 270, 271

**LIVE AND DEAD STOCK,**

- meaning of, 151

**LIVING,**

- when it passes advowson, 154, 155

**LOCALITY,**

- gift of things in a, 121, 122, 150, 151, 186
- of personalty, 160

**LOCKE KING'S ACT** (see **EXONERATION OF MORTGAGED PROPERTY**), 126—133**LONDON,**

- gift to hospitals of, construction of, 290

**LONG ANNUITIES,**

- bequest of, 107

**M.****MAINTENANCE,**

- when interest will be allowed for, 138—141
- gift of annual sum for, duration of, 391, 396
- intermediate interest for, effect of upon vesting, 276
- trust for, whether it passes to creditors on bankruptcy, 461, 462
- power of, under statute how exercisable, 367
- discretion of trustees when not interfered with, *ib.*
- principles on which trustees should allow, 368
- includes education, *ib.*
- sum expended for, without authority, *ib.*
- when father allowed income for past, *ib.*
- accumulation of past years, when applicable for, 369
- gift to parent for, not subject to account, 385
- gift for, whether to separate use, 468



- MALE HEIR,**  
whether must trace descent through males, 270, 271
- MALE LINE,**  
next of kin in meaning of, 277
- MALE NEPHEW,**  
gift to, 258
- MANAGER,**  
request to employ a person as, 380
- MANDEVILLE'S CASE,**  
rule in, 271, 272
- MANOR,**  
what it includes, 153, 154
- MARITAL RIGHT,**  
what words will exclude (see **CONDITIONS**), 466—469
- MARRIAGE,**  
estate to arise upon, of tenant for life when vested, 405, 406  
gift to be paid upon, is contingent, 411  
effect of gift of intermediate income, *ib.*  
gift upon, construed as gift at twenty-one or upon marriage under twenty-one, *ib.*, 412  
condition requiring, with consent of several persons becomes impossible by death of any, 450  
conditions in restraint of (see **CONDITIONS**), 458—458  
gift over upon, without consent limited to minority, 490  
——— death before, 527—530
- MARRIED WOMAN,**  
will of, where valid, 15—18  
cannot elect in respect of her reversionary interest, 83  
power vested in, when executed by general words, 172  
property appointed by, is subject to debts, 624
- MARSHALLING, 627—629**  
in what cases the assets will be marshalled, 627  
between legatees and heir or devisee charged with debts, *ib.*  
——— legatee and devisee of mortgaged lands, *ib.*  
——— legatee and residuary devisee assets not marshalled, *ib.*  
——— legatee and devisee subject to a lien for purchase money, *ib.*, 628  
——— legatees with and without a charge on realty, 628  
assets will not be marshalled in favour of charity, *ib.*, 629  
effect of direction to pay charities out of pure personalty, *ib.*  
——— reserve pure personalty for charity, 629
- MASSSES,**  
gifts for, 293, 294
- MESSUAGE,**  
or house, meaning of, 155
- MINES,**  
devise of, whether carries past rents, 154
- MINORITY,**  
gift of maintenance during, 139, 140  
meaning of, 415  
gift of annuity during, 396, 397

**MISTAKE,**

- in testator's belief will not raise election, 53
- in description of things, effect of, 99—101
- bequest of thing sold before the date of the will, 10
  - \_\_\_\_\_ testator never possessed, *ib.*
- in description of persons, 209—214
  - \_\_\_\_\_ charity, 297
- in number of children, 241—243
- in recital will not alter the gift, 577
- in testator's belief, will not cause revocation of or addition to a legacy,
  - ib.*, 578. See *Re Dyke*, 44 L. T. N. S. 568.
- in amount of advances binds legatee, 597

**MOIETY,**

- when it will pass the fee, 325

**MONASTIC ORDERS,**

- gifts to, 292, 293

**MONEY,**

- what it includes, 144—147
- when it will pass the residuary personality, 145, 146
- ready money, 146, 147
- "due and owing at my decease," what it includes, 146
- in the funds, 147
- securities for, *ib.*, 148
- on security, whether it passes the legal estate, 148, 149

**MORTGAGE,**

- beneficial interest in, when it passes by general words, 167
- legal estate in, when it passes by general words, 168—170
- exoneration of (see EXONERATION), 126—133
- successive and concurrent, how borne, 133
- power to, involves power of sale, 363
- power of executor over personality, 364

**MORTMAIN,**

- gifts in (see CHARITY), 302—313

**MOTIVE,**

- description supplying prevails, 214
- distinguished from trust, 385
- equal legacies given from same, are substitutional, 117

**MOVEABLE PROPERTY,**

- what is, 1

**MUTUAL WILLS,**

- validity of, 12, 13

**"MY,"**

- effect of word in excluding property subject to a power, 174
- \_\_\_\_\_ making legacy specific, 106

**N.****NAME,**

- when it prevails over the description, 209, 210
- condition of taking a particular, 458
- devise to heir of a particular, 270
- gift to next of kin of a particular, 278
- right to sue in testator's name, not devisable, 72
- gift to persons before named may mean before mentioned, 555

## NAMELY,

whether it restricts large words, 183

## NEAREST OF KIN (see NEXT OF KIN), 277, 278

## NEAREST RELATIONS (see RELATIONS), 263

## NEPHEWS AND NIECES,

meaning of, 257, 258

refers *primâ facie* to children of brothers and sisters, including the half-blood, 257

great-nephew called a nephew, *ib.*

in what cases a wife's nephew may take, *ib.*

in what cases grandnephews may take, 258

male nephews, gift to, *ib.*

whether gift to, raises equivocation between nephews proper and wife's nephews, 212

## NEXT HEIR MALE,

when it is a word of limitation, 342

## NEXT LEGAL REPRESENTATIVES,

meaning of, 285

## NEXT OF KIN,

bequests to, 275—283

meaning of, 275

legal or next of kin, *ib.*

half blood admitted, *ib.*

selective power to appoint to, *ib.*

*ex parte maternâ*, *ib.*

effect of reference to the statute or intestacy, *ib.*, 276

husband or wife do not take as next of kin, 276

when widow included, *ib.*

intention to leave property to next of kin not carried out, *ib.*

what will exclude one of the next of kin from the class, *ib.*

whether the statute fixes the proportions as well as the persons, *ib.*, 277

nearest of kin by way of heirship, 277

in the male line, *ib.*

nearest of a class, *ib.*, 278

of a particular name, 278

gifts to, exclusive of A. who is sole next of kin, *ib.*, 279

meaning explained by context, 279

of A. as if she had died unmarried, *ib.*, 280

when the class is to be ascertained (see CLASS), 280—283

election by,

title as, to an intestate may raise election, 84

of married woman, whose will becomes inoperative not put to election, 90

title as, in case of intestacy,

to interests undisposed of under trusts for conversion, 197, 198

how they take property to be converted, 198, 199

to accumulations released by statute, 448

whether gift in satisfaction of all claims bars a title as next of kin, 611

direction that one of the next of kin is to take no share when effectual, 610—612

## NEXT PRESENTATION,

under what words it passes, 154, 155

NEXT SURVIVING SON,  
meaning of, 221

NICKNAMES,  
evidence of meaning of, admissible, 208

NIECES,  
meaning of, 257, 258

NOR,  
meaning of in condition precedent, 581

NOTICE,  
of condition, not necessary for forfeiture, 451  
to treat, effect of upon conversion, 205

NOW,  
whether it restricts general words to the date of the will, 98, 162  
invested, gift of a sum, whether specific or demonstrative, 108

NUMBER  
of children—mistake in, 241—243

NUNCUPATIVE WILL,  
who may make, 52, 53

## O.

OBLITERATION  
of part of will, effect of, 34  
——— legacy, 38, 39

OCCUPATION,  
description by, 97, 98, 99  
——— when it passes easement, 156  
devise of use and, *id.*

OFFICE,  
gifts in respect of, to executors, 287, 288  
——— when charitable, 295, 296  
annuity in respect of duration of, 396

OMISSION. See BLANKS, SUPPLYING WORDS.

ONEROUS LEGACIES,  
when they may be rejected, 82

ONE  
of a class, gift to, 219

OPTION,  
to purchase, effect of, on a devise, 203, 204  
legatee may exercise after compulsory sale, 457

OR,  
when changed into And,  
in a devise to A. or his heirs, 331  
——— A. or the heirs of his body, *id.*  
gift of an annuity to A. or his heirs, 393  
in a gift apparently substitutional, 492  
in a condition precedent to vesting, 581  
in gifts over, 530, 531

OR—*continued.*

- if A. dies under age or without issue after devise in fee, 530
- \_\_\_\_\_ after devise for life remainder in tail, *ib.*
- after prior absolute gift, *ib.*
- after devise in tail, 531
- after a gift to be vested in one or other of the two events, *ib.*
- gift over upon death before the tenant for life or under twenty-one, *ib.*
- or explained by the context to mean and, *ib.*

ORDER OF ASSETS (see ASSETS), 618—624

OTHERS,

- survivors when construed (see SURVIVORS), 503—507

OTHER SONS,

- gift to second and, when it includes a first son, 225

OUTLAWRY,

- abolished, 19

P.

PAID,

- may mean vested, 411

PARENT AND CHILDREN,

- bequest to, 314—317
- prima facie* gives concurrent interests, 314
- gift to parent in trust for herself and children, *ib.*
- words of distribution applied to children only, 315
- \_\_\_\_\_ limitation applied to children only, *ib.*
- settlement directed of the whole fund, *ib.*
- continuing trust, *ib.*
- gift of whole to the separate use, *ib.*, 316
- \_\_\_\_\_ parent's interest only to the separate use, 316
- division of the whole at a particular time, *ib.*
- gift over of the whole, if no children, *ib.*
- children contemplated as taking the whole, *ib.*, 317
- express gift to afterborn children, 317
- part of the fund payable at a future period, *ib.*
- gift to children in unequal shares in certain events, *ib.*
- children referred to as heirs, *ib.*
- effect of reference to other gifts, *ib.*
- executory trust, *ib.*
- bequests to parents for life and then to their children, 254, 255
- devises to (see WILD'S CASE, rule in), 216, 217
- bequests to parent in trust for, 384, 385

PARENT AND ISSUE,

- bequests to, 252, 253

PARISH,

- gift for benefit of, 291

PAROL

- evidence, when admissible. See EVIDENCE.
- trust, evidence of, when admitted, 64

PART,

- devise of, when it passes fee, 325

- PARTICIPATE**,  
creates tenancy in common, 320
- PARTICULAR RESIDUE**,  
what is, 188
- PARTICULARS**,  
enumeration of, effect of on large words, 182—186  
——— specific enjoyment, 201
- PARTNERSHIP PROFITS**,  
when apportionable, 134, 135
- PATENT AMBIGUITY**,  
may not be explained by evidence, 96, 208
- PATRIMONY**,  
meaning of, 152
- PAYMENT**  
of legacies (see **INTEREST**), 137—142  
death before, gift over upon, 520—524  
after a direct gift,  
takes effect if legatees die before testator, 520  
——— die before time of payment where one is  
fixed, *ib.*  
refers to death before testator where no time of payment named, *ib.*  
See *In re Chaston*, W. N. 1881, 101  
after a life interest,  
takes effect if legatees die before tenant for life, where no time of  
payment is fixed, 520, 521  
where there is a life interest and period of payment, 521  
takes effect on legatee dying before testator, *ib.*  
when the bequest is contingent upon attaining twenty-one, *ib.*,  
522  
when the bequest is vested to be paid at twenty-one, 523  
when the original gift is contingent on surviving the tenant for life,  
524
- PECUNIARY LEGACIES**,  
include annuities, 153
- PER CAPITA AND PER STIRPES** (see **DISTRIBUTION**), 252—256, 286
- PERFORMANCE**  
of conditions, 454, 456, 457, 458
- PERPETUITY**, 424—443  
statement of the rule, 424  
gift not charitable, void if it involves, 291, 292  
gift to charity on remote event is void for, 297  
gift over of property given to charity cannot be too remote, 424  
direction to buy foreign land, *ib.*  
whether the rule applies to legal remainders, 424—429  
remainder to unborn son of unborn person void, 425  
remote equitable remainder not valid if event happens within limits, 430  
the state of things existing at the death is to be considered, *ib.*  
the fact that a woman is past child-bearing rejected, *ib.*  
gift tending to tie up property is void unless charitable, *ib.*, 431  
restraint upon anticipation, 431  
direction to lease at low rent, *ib.*  
——— not to raise rent, *ib.*  
devise upon remote event, *ib.*

**PERPETUITY—continued.**

- whether limitations subsequent to an estate tail can be too remote, 431, 432
- term precedent to an estate tail may be too remote, 432
- concurrent terms, *ib.*
- accumulation for payment of debts is valid, 433
- accumulation till a fund reaches a certain sum, when valid, *ib.*
- whether powers of sale and leasing can be void for, *ib.*
- gift to persons who must be living at the testator's death and time of vesting good, *ib.*
- gift is void if the event is too remote, though the persons may not be, *ib.*, 434
- gift for life to unborn children of tenant for life is good, 434
- cross limitations between unborn tenants for life, *ib.*, 435
- substitution of issue, 435
- remote gift over of life interest, *ib.*
- whether bequest for life following on life interests of unborn person can be valid, *ib.*
- limitations following upon void limitations are void, *ib.*
- alternative contingent limitations may be good, *ib.*, 436
- gift to a class to be ascertained beyond limits of perpetuity, 436
- whether gift to an individual and a remote class is void, *ib.*
- where the shares of the members of the class can be severed, 437
- gift to a person satisfying a description must be ascertained within limits of, 438
- effect of the words as far as the rules of law permit, *ib.*, 439
- direction that personalty is not to vest in a tenant in tail dying under twenty-one, 439
- power authorising appointment void for, is valid within the proper limits, 440
- in case of special powers, persons must be capable of taking under the original instrument, *ib.*
- when there is a clear appointment invalid restrictions may be rejected, *ib.*
- cy pres* doctrine (see *CY PRES*), 441—443

**PERSONÆ DESIGNATÆ,**

- gifts to (see *DESCRIPTION*), 207—214

**PERSONAL PROPERTY,**

- estate and effects, gift of, confined to personalty, 157
- described by reference to locality, 160

**PERSONAL REPRESENTATIVES,**

- meaning of (see *REPRESENTATIVES*), 283—286

**PLANT AND GOODWILL,**

- meaning of, 151

**PLATE,**

- meaning of, 150
- use of, what passes under, 156

**POOR RELATIONS,**

- gifts to, whether charitable, 294, 295

**PORTIONS,**

- when younger children means children entitled to, 223—225
- vesting of (see *VESTING*), 406, 407
- what are, within the exception in the *Thellusson Act*, 445, 446
- satisfaction of, by legacies (see *SATISFACTION*), 586—590

**"POSSESSED OF,"**

whether gift of all which testator is, passes realty, 159  
effect of these words in passing leaseholds, 165

**POSSESSION,**

title by, is devisable, 72  
gift over on death before, 522  
of real estate, bequest of chattels to person in, 552—555

**POSTHUMOUS CHILD,**

gift when confined to (see *CHILD EN VENTRE*), 240

**POWER,**

will under, how far governed by domicile, 1  
——— how revoked, 35  
to make unattested will void, 64  
to arise on contingency, when exercisable, 72  
to contingent person, 72, 73  
to be exercised in writing, 72  
testamentary, what is, 73, 74  
——— effect of Wills Act on execution of, 74,  
to appoint to tenants in common, how executed, 321  
of sale (see *SALE, POWER OF*), 354—363  
added to gift of income, 375  
implication from, when not executed, 570  
——— (see *IMPLICATION*.)  
class to take in default of appointment, 251—253  
distinguished from estate, 355, 356  
——— — property, 375, 376  
to convert, will not effect conversion till exercised, 192, 193  
of advancement, effect of, upon vesting, 416  
vesting of gifts under, 422, 423  
selective to appoint to relations, construction of, 264  
——— — next of kin, 275  
of sale, effect of on estates of trustees, 349  
——— — when executors take, 360—363  
——— — whether it can be too remote, 433  
of leasing, effect of on estates of trustees, 351  
——— — what is general, *ib.*  
of management and disposition distinguished, 433  
superadded to absolute gifts, 375, 376  
——— — life interest, 376  
what will be inserted in executing executory trusts, 560, 561, 562  
execution of,  
by general words, 170—181  
of appointing realty, 170, 171  
——— — personality, 171, 172  
where the appointor is a married woman, 172  
effect of the Wills Act, 176—181  
of revocation, 177  
general direction to pay debts, 178, 179  
by will made previous to creation of the power, 173, 179  
what is a sufficient reference to a, 173, 174  
what is a sufficient reference to property subject to a, 175, 176  
to retain investments, effect of on conversion, 193, 201

**PRECATORY WORDS,**

when they create a trust (see *TRUST*), 379—386

**PRE-EMPTION,**

right of, must be literally construed, 457



- PREMISES**,  
    meaning of, 157
- PRIORITY**,  
    between legatees (see **ABATEMENT**), 620—622
- PRIVATE CHARITY**,  
    gift for, is void, 291
- PROBATE**,  
    on what evidence granted, 22, 23  
    what entitled to, 66, 67  
        instrument naming executor, 66  
        contingent will or codicil, *ib.*  
        instrument naming guardians, *ib.*  
        will of married woman, *ib.*, 67  
        will of realty, 67  
        foreign will, *ib.*  
    what should be included in, 68  
    when scandalous passage omitted, 22  
    where granted, 68  
    effect of on realty, *ib.*, 69  
    conclusive on question of fraud, 69
- PROFITS.** See **RENTS AND PROFITS**.  
    what are, accruing after death of testator,  
        bonus on shares declared before the death, payable afterwards, 134  
        partnership, declared after death for a period ending in lifetime, *ib.*  
    debts are, of the year when they are got in, *ib.*  
    apportionment of, *ib.*, 135
- PROPERTY**,  
    when it will pass realty, 157, 158  
    when it will pass the fee, 325  
    devise of, whether it executes general power over realty, 176—178  
    distinguished from power, 355, 356, 375, 376
- PROVIDE**,  
    gift to, a school, 308
- PUBLIC POLICY**,  
    conditions contrary to, validity of, 400, 450—453
- PUR AUTRE VIE**,  
    devise of estate, 71, 72  
    rule in *Shelley's case* applies to estates, 335  
    gift in default of issue of an estate, 546  
    descent of estate, 612, 613
- "PURCHASED,"**  
    gift of property, 148
- PURCHASE MONEY**,  
    for land devised and afterwards sold, right to, 203, 204
- PURPOSE**,  
    gift for a particular, when legatee entitled absolutely, 386  
    \_\_\_\_\_ ademed if the purpose is satisfied by testator, 500—  
        592
- R.**
- RAILWAY SHARES**,  
    include stock, 150

- READY MONEY,**  
     meaning of, 146, 147
- REAL EFFECTS,**  
     will pass realty, 160
- REAL ESTATE,**  
     words appropriate to, 157—160  
     devise of, when it carries leaseholds, 166, 167
- RECEIPT,**  
     power to give, 363, 364  
     whether agent can give, 364  
     gift over, upon death before,  
         to what period it refers, 522  
     whether gift over upon death before actual receipt is valid, 524—526
- RECEIPT CLAUSE,**  
     effect of, on estates of trustees, 348  
     ——— in creating separate use, 467, 468  
     ——— in creating restraint upon anticipation, 470, 471
- RECITAL,**  
     effect of, in excluding property from residue, 189  
     implication by (see **IMPLICATION**), 574  
     incorrect, of gift, will not cut it down, 577  
     ——— of advance, effect of, 597
- REFERENCE,**  
     gifts by, 552—555  
         bequest of chattels, according to limitations of realty, vests in first  
             tenant in tail at birth, 552  
         bequest to person in actual possession of freeholds, *ib.*  
         chattels do not vest in tenant in tail, defeasible by birth of issue to  
             take under prior limitations, *ib.*  
         bequest of chattels to person entitled in possession to real estate, *ib.*,  
             553  
         personalty to go with a title, 553  
         intention that a person not in actual possession shall not take, *ib.*  
         whether words "as far as the law permits" will carry on chattels  
             directed not to vest in a tenant in tail dying under twenty-one,  
             *ib.*, 554  
         bequest in the same manner as prior gifts, how far they import the  
             limitations of the prior gifts, 554  
         whether gift upon trusts of a prior gift is subject to same charges  
             as the prior gift, 555  
         gift to persons "before named," *ib.*  
         what is a sufficient, to a power, 173—175  
         ——— to property subject to a power, 175, 176
- REFERENTIAL CONSTRUCTION**  
     of gifts in default of issue, 535—541  
         (See **DEATH WITHOUT ISSUE**)
- REIMBURSEMENT CLAUSE,**  
     effect of, on gift of residue to executors, 289
- RELATIONS,**  
     gifts to, 263—266  
         restricted to persons capable of taking by statute, 263  
         they take *per capita* as joint tenants, *ib.*  
         power to select relations extends to all relations, 264  
         when the class to take is ascertained, 264—266  
     poor relations, gifts to, whether charitable, 294, 295  
     precatory trust for, 380

**RELEASE,**

condition requiring, construction of, 458

**RELIGION,**

of children, directions as to, in will, 79  
gift over on change of, valid, 452

**RELIGIOUS PURPOSES,**

gifts for, 181

**REMAINDERS,**

(See LIMITATIONS, EXECUTORY INTERESTS, CONTINGENT REMAINDERS).

distinguished from executory interests, 474, 475

incidents of, *ib.*

contingent (see VESTING), 244, 245, 402—406

———, whether they can be too remote, 424—429

equitable, whether remote where event happens during particular estate, 429, 430

in chattels, 472

after absolute interest, 473

**REMOTENESS,**

(See PERPETUITY), 424—443

**REMOVAL,**

effect of, on bequest of things in a house, 121, 122

**RENEWABLE LEASEHOLDS,**

conversion of, into fee simple, effect of, 206

**RENEWAL,**

fund for, right to, as between tenant for life and remainderman, 648

finer for, apportionment of between successive takers, *ib.*, 649

**RENT CHARGE,**

devise of, is specific, 110

on house, when passes with house, 167

what words create, 387

charged on realty and personalty issues out of realty, *ib.*

whether it can be entailed, 388

distinguished from an annuity, *ib.*

when it has priority over legacies charged on land, 620, 621

whether devise of, charges real estate, 631

**RENTS AND PROFITS,**

from death pass to specific devisee, 133, 134

accumulations of, pass with devise of surface, 154

devise of, when it passes the fee, 327

——— effect of, on specific enjoyment, 202

increase in value of, given to charity, 299—301

apportionment of, 134—135

power to raise sum out of, authorises sale, 634, 635

——— fines out of, to renew leaseholds given in succession, 635

intermediate, right to, 135—137

of contingent devisees pass to heir or residuary devisee, 135, 136

of contingent residuary devise pass to heir, 136

of contingent residuary bequest pass to legatee, *ib.*

mixed fund of residue carries, *ib.*, 137

apportionment of, between specific and residuary legatees, 135

right of devisee to, between death and completion of sale of land

devised and converted by testator, 205, 206

who entitled to, between shifting and birth of issue to take, 550

## REPRESENTATIVES,

- meaning of,
  - where used as a word of purchase, 283—286
  - prima facie* means executors, 283
  - where it means next of kin, *ib.*, 284
  - substitutional gifts to, 284
  - may mean descendants, *ib.*
  - substitutional gifts to, after a life estate, *ib.*
  - effect of words of distribution, 285
  - use of executors in other parts of the will, *ib.*
  - direction to pay to, where executors are named, *ib.*
  - explained by other words, *ib.*
- where used as a word of limitation, 370

## REPUGNANT CONDITIONS,

(See CONDITIONS), 458—471

## REPUTATION,

- marriage proved by, 227
- of parentage of illegitimate child, 233—238

## REQUEST,

- conversion upon, 193

## RESIDENCE,

- condition requiring, 452, 458

## RESIDUARY DEVISE,

- is specific, 110

## RESIDUARY LEGATEE,

- effect of appointment of, 152, 153, 194—197
- In re Methuen and Blore*, 16 Ch. D. 696
- "of all my property," appointment of, 152

## RESIDUE,

- gift of,
  - what is, 182—186
  - enumeration of particulars in, 182, 183, 184
  - when specific, 111—113, 187
  - contingent, when it passes interest, 136, 137
  - when it passes under word money, 145, 146
  - "remaining," gift of, 94
  - when it executes power, 181
- what passes under gift of, 187—191
  - of appointed fund, 187
  - after payment of legacies, *ib.*
  - of particular part of testator's property, *ib.*, 188
  - of lands in A., 187
  - of personal fund, 188
  - general and particular, *ib.*
  - general, what it passes, *ib.*, 189
  - intention to exclude certain property, 189
  - restrictive words, *ib.*
  - small remainder, *ib.*
  - property excepted from, *ib.*, 190
  - residue of residue, 190
  - revocation of share of, *ib.*, 191
  - accumulations released by statute, 448
  - gift of, executes general power, 177, 178
  - whether it executes the power in all events, 180

**RESIDUE—continued.**

- conversion of, between tenant for life and remainderman, 199—203
- gift of, to executors, whether beneficial or in trust, 288, 289
- vesting of, argument in favour of, 414, 416
- whether it is a legacy, 153
- two gifts of, in same will, effect of, 579
- gifts of remainder and, in same will, *ib.*
- of a particular fund, gift of, where void for uncertainty, 584, 585
- undisposed of, passes to next of kin, 613, 614
  - what is a contrary intention, 613
  - when there are no next of kin the executors take, 614—61
- (See EXECUTORS.
- whether primarily liable for payment of debts, 618
- lapsed share of residue whether applicable before shares well disposed of, 619
- what is, as between tenant for life and remainderman, 646—64

**RESPECTIVE,**

- stirpital force of the word, 253
- devise to several and heirs of their respective bodies, 319
  - and their respective heirs, *ib.*
- creates tenancy in common, 320

**REST,**

- gift of all the, passes realty, 159

**RESTRICTIONS,**

- effect of, on prior absolute interest, 377, 378
- invalid, when they may be rejected, 440

**RESULTING TRUSTS, 608, 609**

- devise subject to a charge which fails carries the whole, 608
- in what cases the devisee takes subject to the charge or only what remains after satisfying the charge, *ib.*
- direction to pay a certain sum, *ib.*
- direction to raise a sum disposed of in all events, *ib.*, 609
  - for purpose which may fail, 609
- charge created by will and by a prior instrument, *ib.*
- devise subject to, and upon trusts, *ib.*
- exception of property out of a devise, *ib.*

**RETAINER,**

- right of, against specific legatees, 44
- against general legacy, 123, 124

**REVERSION,**

- married woman cannot elect in respect of, 83
- whether it passes under general words, 162—164
- acquisition of, in leaseholds given by the will, 122, 123
- interest upon legacy charged upon, 138
- devise in default of issue, when it refers to failure of subsisting estates, 546, 547
- power of sale over, when exercisable, 358

**REVIVAL OF WILL, 58—62**

- revoking will revoked, 58
- by codicil, 58—60
- by incorporation, 60—63

**REVOCAION, 35—47, 422—424**

- by marriage, 35
- of will under power, *ib.*
- alteration of circumstances, 36
- during insanity, *ib.*
- destruction, *ib.*

**REVOCATION**—*continued.*

- dependent relative, 37—39
- several inconsistent instruments, 41, 42
- description as last will, 42
- clause of, *ib.*
- codicil reviving revoked will, *ib.*, 43
- by acts, 44, 45
- destruction of duplicate, 46
- of will of soldier or seaman, 56, 57
- of trustee appointed by will, 346
- by change of interest, 122, 123
- of share of residue, effect of, 190, 191
- by alteration of estate, 575
- effect of section 32 of the Wills Act, *ib.*
- it must be reasonably clear that a bequest was meant to be revoked, 576
- gift to A. for life with remainders with revocation of gift to A., *ib.*
- whether revocation revokes executory gifts over, *ib.*
- gifts will not be revoked further than is necessary, *ib.*
- of devise subject to a charge, 577
- revoked legacy not set up because the attempted disposition fails, *ib.*
- of devise of realty when personalty is given upon the trusts of realty, *ib.*
- erroneous recital will not effect, *ib.*
- erroneous assumption of fact will not effect, *ib.*  
(See INCONSISTENCY, 578—580.)
- effect of, of share of a member of a class, 606

**RIGHT HEIRS MALE,**  
devise to, 270, 271**RIGHT TO SUE,**  
in testator's name not devisable, 72**ROMAN CATHOLICS,**  
position of, as regards charitable gifts, 292, 293**S.****SAID,**  
effect of the word in substitutional gifts, 495, 496

**SALE,**

- contract for, converts, 203, 204
- under compulsory powers converts, 205
- under decree converts, *ib.*, 206
- power of, 345—363
  - and exchange authorises partition, 354
  - whether authorises mortgage, *ib.*
  - severance of minerals, *ib.*
  - extends to purchased lands, *ib.*
  - at death of tenant for life not exercisable before, *ib.*, 355
  - within limited time, 355
  - when it survives, *ib.*
  - distinguished from trust, *ib.*
  - direction to executors to sell, *ib.*, 356
  - bare power whether it survives, 356
  - given to named persons, *ib.*
  - executor of executor cannot exercise, 357
  - whether infant can consent to exercise of, *ib.*
  - consent of tenant for life after alienation, *ib.*
  - bankruptcy,
  - with consent, how exercisable, *ib.*, 358
  - over reversion, 358

**SALE**—*continued.*

- future sale under bad, 358
- several estates together, *ib.*, 359
- when spent, 359
- when trustees compelled to exercise, *ib.*
- whether suspended by administration action, *ib.*, 360
- where persons to exercise not named, 360
- when implied from charge of debts, 360—363
- implied in power to mortgage, 363
- over personalty, executors have, 364
- effect of, on estates of trustees, 349, 350
- whether it can be too remote, 433
- whether included in usual powers, 561
- gift over on death before completion of, whether valid, 523
- whether power to raise out of income authorises, 634, 635

**SANITY,**

- not presumed, 14

**SATISFACTION, 586—594**

- of portions by legacies,
  - arises between a gift and a promise to give, 586
  - distinguished from ademption, *ib.*, 587
  - covenant to settle for life and absolute bequest, 587
  - effect of some legacies being expressly in, 588
  - effect of difference between covenant and bequest, *ib.*
  - land and money, *ib.*
  - portion and residue, *ib.*
  - contingent legacy and vested portion, *ib.*
  - what difference between covenant and will rebuts, *ib.*, 589
  - effect of a direction to pay debts, 590
- in the case of strangers,
  - only arises by express declaration, 590
  - whether provision by will is advancement in legatee's life, *ib.*, 591
- of debts by legacies :
  - legacy of equal or greater amount satisfies a debt, 592
  - what debts may be satisfied, *ib.*
  - what legacies will work, *ib.*, 593
  - effect of difference between the nature of the debt and legacy, 593
  - effect of direction to pay debts and legacies, 594
  - debts only, *ib.*

**SCANDALOUS PASSAGES,**

- when omitted from probate, 22

**SEAMEN,**

- wills of, 48—57

**SECOND COUSINS,**

- meaning of, 258

**SECOND**

- son, gift to, 219, 220
- and other sons may include first son, 225

**SECRET TRUST,**

- evidence of, when admitted, 64, 65
- for charity, 313
- whether the legal estate passes, 311, 313

**SECURE,**

- direction to,
  - effect of in creating tenancy in common, 321

**SECURITIES FOR MONEY,**

- what passes under, 143
- whether it passes legal estate, *ib.*, 149

**SEISED,**

- meaning of, 159

**SELECTION,**

- when legatee has a right of, 101

**SEPARATE USE,**

- what words create, 466—469
- effect of, on gift to mother and children, 315, 316
- remainders to the, on estates of trustees, 347, 348
- when direction to settle imports, 559
- settlement to the, will be without power of anticipation, 561

**SERVANTS,**

- gifts to, 215

**SETTLE,**

- direction to,
  - effect of, on gift to parent and children, 315
  - on joint tenancy, 321
  - will not prevent lapse where an absolute interest is given in the first place, 345
  - effect of, on prior absolute interest, 337, 377, 378
  - when confined to period of distribution; see *Money v. Money*, 29 W. R. 660
  - when confined to life of a tenant for life, 486
  - distinguished from substitutional gift, 493
  - how carried out by the Court, 558—560
  - what powers it will authorise, 561, 562

**SEVERAL INHERITANCES,**

- and joint life interests, 319

**SEVERANCE,**

- of income of joint property as it accrues, 318
- effect of, upon vesting, 412, 413
- in carrying interest, 141
- of shares of members of a class, which is too remote, 437, 438

**SHARE,**

- devise of, will pass the fee, 325
- when it creates a tenancy in common, 320
- will not pass accrued shares, 516

**SHARES,**

- calls upon, when payable by legatee, 125, 126
- bonus on, when it passes, 134
- in public companies, when within the Statute of Mortmain, 305
- railway, include stock, 150
- mining, *ib.*
- when they should be sold, 365

**SHELLEY'S CASE,**

- rule in, 335—345
- in the case of realty:
  - limitation to heirs coalesces with life estate of the ancestor, 335



SHELLEY'S CASE—*continued*.

- the two limitations must be in the same instrument, 335
- applies to freeholds, copyholds, and estates *pur autre vie*, *ib.*
- applies where both limitations are legal or equitable, *ib.*
- does not apply where one limitation is legal the other equitable, 336
- does not apply so as to destroy intermediate contingent limitations, *ib.*
- whether it applies where the limitation to the heirs is conditional or an alternative contingent remainder, *ib.*
- application of, where the limitation is to heirs or heirs of the body, 336—342
  - applies though estate of the ancestor expressly limited for life, 336
  - words of limitation superadded to the heirs are immaterial, 337
  - words of distribution superadded to the heirs are immaterial, 338
  - gavelkind lands follow same rule, *ib.*
  - gift over in default of issue is immaterial, *ib.*
  - words of limitation and distribution superadded are immaterial, *ib.*, 339
  - words of limitation superadded inconsistent with the course of descent, 339, 340
  - heirs explained to mean children, 340, 341
  - application of, when the limitation is to first heirs male, or heirs of the body who attain twenty-one, 342
  - application of, where the limitation is to the heir, *ib.*
    - next or first heir, *ib.*
    - limitation to the heir for ever, *ib.*
    - words of limitation superadded, *ib.*
    - where the estate of the heir is for life, *ib.*
- application of, where the limitation is to issue, 342—345
  - distinction between issue and heirs, 343
  - effect of words of distribution superadded, *ib.*
  - whether a gift over in default of issue is material, *ib.*
  - effect of words of limitation superadded, 344
  - whether the absence of a gift over is material, *ib.*
  - words altering the course of descent, *ib.*
  - words of limitation and distribution superadded, *ib.*, 345
  - effect of the Wills Act, 345
  - effect of a direction against alienation, *ib.*
- in the case of personalty, 371—373
  - when the limitation is to the heirs of the tenant for life, 371
    - effect of words of distribution, 372
  - when the limitation is to the issue of the tenant for life, 373, 374
    - what will convert issue into a word of purchase, *ib.*
- when realty and personalty are given together, 374
- the rule applies to rent charges, 387, 388
- how far it applies to executory trusts, 557, 558

## SHIFTING CLAUSES, 548—551

- operate upon a life interest though it comes into possession upon the event on which the estate is to shift, 548
- possession of settled estates refers to possession under the settlement, *ib.*
- meaning of "entitled," 549
- where the devisee takes under a re-settlement, *ib.*
- whether they take effect on estates in remainder, *ib.*
- repeated operation of, *ib.*, 550
- will not void jointures and portions properly charged, 550
- when estates under, go to trustees to preserve, *ib.*
- who is entitled to intermediate rents, *ib.*
- estates directed to shift as if devisee were dead without issue, *ib.*, 551

**SIGNATURE**

- of testator to will, 23—26
  - mark, 23
  - assumed name, 24
  - seal, *ib.*
  - dry pen, *ib.*
  - by agent, *ib.*
  - how connected with will, *ib.*
  - position of, *ib.*, 25
  - words under, 25, 26
  - attestation of, 26, 27
  - acknowledgment of, 27, 28
  - tearing off, 45. See *Magnesi v. Hazelton*, 44 L. T. N. S. 586

**SMALL BALANCE,**

- gift of, what it passes, 189

**SMALL REMAINDER,**

- what it passes, 189

**SOLDIERS,**

- wills of, 48—57

**SOLE,**

- when it creates a separate use, 468, 469

**SON,**

- gift to A., second son of B., when he is the first, 212, 213
- gift to "a," construction of, 219
- a first or second, *ib.*
- when used as a word of limitation, 332, 333

**SPECIAL POWERS,**

- execution of (see **POWERS**), 173—176

**SPECIFIC ENJOYMENT**

- of residue, when tenant for life entitled to, 199—203

**SPECIFIC ENUMERATION OF THINGS,**

- in residuary gift, effect of, 182, 183
- effect of, on specific enjoyment by tenant for life, 201, 202

**SPECIFIC GIFT,**

- description of, 100, 101
- increase of value of, 101, 102
- inaccurate description, 102
- sale of, before date of will, *ib.*
- sale and re-purchase, *ib.*, 103
- confirmation by codicil, effect on, 103
- carries profits, 134
- what is a,
  - gift of stock in round numbers, 104
  - direction to transfer stock, 105
  - gift of stock on trust to sell is specific, *ib.*
  - rest of "my" stock makes prior gifts specific, *ib.*
  - stock not in round numbers, *ib.*, 106
  - effect of the Wills Act, 106
  - gift of part of a specific fund, *ib.*
  - money out of money, *ib.*
  - money out of stock, *ib.*
  - direction to pay out of a certain fund, *ib.*
  - whether a gift is money out of money, or money out of stock, 107

**SPECIFIC GIFT—continued.**

- whether necessarily subject to ademption, 108
- gift of a sum "invested" in a particular way, *ib.*
- of a particular debt, *ib.*, 109
- and gift of aliquot part of a fund, distinction between, 109
- gift of a sum payable out of real estate, 110
- effect of directions in the will on a, *ib.*, 111
- when a gift of residue is, 111, 112, 187
- when a gift of residue of a specific fund is, 112, 113
- ademption of (see **ADEMPMENT**), 119—122
- retainer against, 123, 124
- exoneration of (see **EXONERATION**), 124—126

**STAMP DUTIES,**

- tables of (see **APPENDIX**), 495, 496

**STATUTE OF DISTRIBUTIONS,**

- effect of reference to, 276, 277

**STATUTES CITED,**

- 21 Hen. VIII. c. 4 (Executor's power of sale), 356
- 23 Hen. VIII. c. 10 (Superstitious Uses), 293.
- 32 Hen. VIII. c. 1 (Wills), 92
- 34 & 35 Hen. VIII. c. 5 (Wills), *ib.*
- 1 Edw. VI. c. 14 (Superstitious Uses), 293
- 43 Eliz. c. 4 (Charitable Uses), 290, 311
- 12 Car. II. c. 24 (Guardians), 77, 78
- 1 Will. & M. c. 18 (Dissenters), 293
- 4 Geo. II. c. 28 (Right to Distrain), 387
- 9 Geo. II. c. 36 (Mortmain), 302
- 39 & 40 Geo. III. c. 98 (Thellusson), 443
- 42 Geo. III. c. 116 (Land Tax Redemption), 311
- 43 Geo. III. c. 108 (Church Building), 312
- 55 Geo. III. c. 192 (Devise of Copyholds), 164
- 10 Geo. IV. c. 7 (Monastic Orders), 292
- 11 Geo. IV. & 1 Will. IV. c. 40 (Residue, Executors), 288, 618
- 2 & 3 Will. IV. c. 75 (Anatomy), 80
- 2 & 3 Will. IV. c. 115 (Roman Catholics), 292
- 1 Vict. c. 26 (Wills Act) (printed in Appendix), 653
- 6 & 7 Vict. c. 37 (Endowment of Districts), 312
- 9 & 10 Vict. c. 59 (Jews), 292
- 15 & 16 Vict. c. 24 (Wills Act Amendment), 24, 25
- 17 & 18 Vict. c. 113 (Locke King), 126, 127
- 20 & 21 Vict. c. 57 (Malins' Act), 124
- 22 & 23 Vict. c. 35 (Charge of Debts, Receipts), 360, 361, 363
- 23 & 24 Vict. c. 134 (Roman Catholic Charities), 293
- 23 & 24 Vict. c. 145 (Mortgages Powers, Maintenance), 140, 363, 367
- 24 & 25 Vict. c. 114 (Domicile), 1, 2
- 24 & 25 Vict. c. 121 (Domicile), 8
- 28 & 29 Vict. c. 72 (Navy and Marines (Wills) Act), 48—50
- 30 & 31 Vict. c. 69 (Locke King Amendment), 126, 128, 131
- 33 Vict. c. 14 (Aliens), 18, 93
- 33 & 34 Vict. c. 23 (Forfeiture), *ib.*
- 33 & 34 Vict. c. 85 (Apportionment), 134
- 37 & 38 Vict. c. 37 (Appointments), 174
- 40 & 41 Vict. c. 33 (Contingent Remainders), 245
- 40 & 41 Vict. c. 34 (Locke King Amendment), 126, 128
- 42 & 43 Vict. c. 59 (Outlawry), 19, 93, 94

**STATUTORY POWERS,**

- effect of sale under, 205

## STIRPES,

- when distribution will be by (see DISTRIBUTION), 252—256
- whether distribution per, will be carried throughout, 253, 254
- how ascertained, 256
- gift to personal representatives per, 286
- when survivorship will be referred to, 503—507. See SURVIVORS.
- when a gift to person then living will be referred to, 422

## STOCK,

- gifts of, when specific, 104, 105
- when it will pass as money, 144, 145
- farming, gift of, 151
- live and dead, gift of, *ib.*
- in trade, may be limited for life, 472

## STRICT

- entail, direction to make, effect of, 557, 558
  - whether it makes tenant for life unimpeachable for waste, 560, 561
- settlement, direction to make, 559

## SUBSTITUTIONAL GIFTS, 491—501

- of personalty to heirs, 274
  - to representatives, 284
  - to executors, 286, 287
- whether a gift to A. or his executors fails by lapse, 286, 287
- do not take effect if the substituted legatees fail, 479
- whether gift to A. or B. is, 491
- gift to A. or B. as C. may appoint, *ib.*
- children, grandchildren, or other descendants, *ib.*
- when both original and substituted legatees must be living at the time of distribution, *ib.*, 492
- when "or" will be changed into "and," 492
- gifts to persons then living, or their issue, *ib.*
- distinguished from gift over at any time, *ib.*, 493
  - absolute gift with direction to settle, 493
- direct gift to A. or his children, *ib.*
- gift after a life interest to A. or his children, *ib.*
- whether substituted legatees can take for original legatees who die in the testator's life, *ib.*, 493
- where the original gift confined to persons living at the death, 494
- whether there can be, in respect of legatees dead at the date of the will, *ib.*
  - where the original gift is to named persons, *ib.*
  - where the original gift is to a class, *ib.*
  - where substituted legatees take original shares, *ib.*, 494
  - gifts to parents then living and the issue of those dead, 495
    - parents then living and the children of such of the said parents as shall be then dead, *ib.*
  - gift to my daughters and their children, 496
  - gift to a class or their issue, *ib.*
  - where original legatees living at date of the will do not satisfy the words, *ib.*
  - gift to substituted legatees in an independent clause, *ib.*
  - direction that the legacy of a parent is to go to children, *ib.*
  - issue to stand in place of parent, 497
  - issue to take share the parent would have been entitled to, *ib.*
- whether contingency attaching to original extends to substituted legatees, 498
  - in the case of original shares, *ib.*
  - substitutional shares, *ib.*
- whether substituted legatees must survive the ancestor, 499

SUBSTITUTIONAL GIFTS—*continued.*

- whether original and substituted classes are mutually exclusive, 499, 500
  - where all original legatees survive, 500
  - where none survive, *ib.*
  - where some survive, *ib.*
- when the class of substituted legatees is ascertained, *ib.*, 501
- whether substituted legatees take *per stirpes* or *per capita*, 255, 256
- issue substituted for parent take jointly, 321, 322

## SUBSTITUTIONAL LEGACIES, 114—118. See CUMULATIVE LEGACIES.

SUCCESSIVE AND JOINT INTERESTS (see PARENT AND CHILDREN)  
314—317

## SUCCESSIVELY,

- devise to several and their heirs, creates estates tail, 323
- absolute interests cannot be given, 472, 473

## SUCH

- child, when restricts heirs, 340, 341
- when it may be rejected, 419
- construction of, in gifts over in default of such issue, 537

## SUCH AS,

- restrictive effect on large words, 183

## SUGGESTIONS

- for preparing wills, 670—672

## SUPERSTITIOUS USES,

- what are, 293, 294

## SUPPLYING WORDS, 582—585

- general rule as to, 582
- limitation to second and other sons supplied, *ib.*
- daughters supplied in a settlement, *ib.*, 583
- words without issue supplied so as not to divest estates tail, 583
- in direction that estates are to determine as if the tenant in tail were dead, 461
- without children supplied so as not to divest vested gifts, 583

## SURFACE,

- devise of, whether it passes rents of mines, 154

## SURRENDER

- of copyholds, no longer necessary, 71, 164

## SURVIVE,

- meaning of, 240, 502

## SURVIVOR

- of two persons, power given to, when exercisable during lives of both, 72, 73, 179
- limitation to, effect in creating joint tenancy, 319

## SURVIVORS, 502—518

- substitutional gift to, does not divest prior gift if there are no survivors, 479
- gift over to, effect of in limiting period of defeasibility, 486, 487
- when the word is used as denoting the quantity of the estate, 502
- meaning of, *ib.*
- a single survivor may take under a gift to, *ib.*
- when survivors will be construed others, 503—507

SURVIVORS—*continued*.

- when gifts to several, and if any die without issue, to survivors, 503
  - to be paid at twenty-one, and if any die under twenty-one, to survivors, with gift over, *ib.*
  - whether gift over is material, *ib.*
  - survivorship between tenants in tail referred to stirpes, *ib.*, 504
  - gift over is immaterial, 504
  - gifts for life and then to children, if any die without children, to survivors for life, and then to their children, *ib.*
  - gift over is immaterial, 505
  - gift to "others surviving," *ib.*
  - gift over after death of survivor, *ib.*
  - gift to survivors not subject to limitations of the original shares, *ib.*, 506
  - general intention to benefit stirpes, 506
  - gifts for life and then in tail, gifts to survivors in tail, *ib.*
  - where some shares are settled others not, *ib.*, 507
  - gift to survivors subject to same defeasibility as original shares, 507
- when gifts to, cease to operate, 508—511
  - period of distribution is limit of defeasibility, 508
  - whether only gift is in direction to pay or not, *ib.*
  - same rule applies to realty, *ib.*
  - direct gift to several or survivors, *ib.*
  - payment postponed, *ib.*, 509
  - after a life interest, 509
  - gift upon a contingency to survivors, *ib.*
  - gift to a surviving class, *ib.*
  - what is a contrary intention, *ib.*
  - effect of powers of advancement, 510
    - words of limitation, *ib.*
  - gifts to be paid at twenty-one, with benefit of survivorship, *ib.*
  - effect of gift over upon death of all under twenty-one, 511
    - before tenant for life, *ib.*
  - gifts to survivors upon death without issue, *ib.*
- when the class of, is to be ascertained, 511—516
  - where the gift is upon death without issue, 511
  - whether the last survivor takes indefeasibly, *ib.*, 512. See *Davidson v. Kimpton*, W. N. 1881, 101.
  - whether the class is to be ascertained when the event happens, or when the shares become indefeasible, 512
  - when there is no vested gift, *ib.*
  - divesting gift to survivors upon death merely, *ib.*
  - direct gift to be paid at twenty-one, and if any die under twenty-one, to survivors, *ib.*, 513
  - gift after a life interest, and if any die before tenant for life, to survivors, 513
  - when survivorship is intended between the legatees, *ib.*, 514
  - gift to survivors if any die without issue before the period of distribution, 514
    - when there is a gift to issue if any die leaving issue, *ib.*
    - when the original gift is to persons living at the time of distribution, *ib.*
    - when there is an intention to divide the whole among persons capable of personal enjoyment, *ib.*
    - general principle, 515, 516
    - when the period of defeasibility is constructively limited, 516
  - gifts to, in default of issue, 545, 546

## SURVIVORSHIP,

- implication of, between annuitants, 393—396
  - gift of annuity to two persons for their lives, 393, 394

**SURVIVORSHIP**—*continued.*

- gift of annuity to two as tenants in common for their lives, 394
- effect of gift over after the death of the survivor, *ib.*
  - after the death of all the annuitants, *ib.*
  - after death of annuitants and a third person, *ib.*
  - after death of "every" of the annuitants, *ib.*
  - to children of annuitants, *ib.*
  - to the heirs of the annuitants, 395
  - where the duration of the annuity is defined by the original gift, *ib.*
- words amounting to a gift to the survivor, *ib.*, 396
- gift with benefit of, passes accrued shares, 517
- of power of sale, 355, 356

**SYMBOLS,**

- evidence to explain, 96

**T.**

**TAIL** (see **ESTATE TAIL**), 329—335

**TENANCY BY ENTIRETIES**, 322

**TENANCY IN COMMON** (see **JOINT TENANCY**), 320—322

**TENANT FOR LIFE AND REMAINDERMAN,**

- of a residue, conversion as between, 199—203. See **CONVERSION.**
- when life tenant unimpeachable for waste under executory trust, 560, 561
- what is capital or income between, 643—646
- of a residue,
  - what is residue, 646
  - to what income the tenant for life is entitled, *ib.*, 647
- apportionment of recovered assets between, 648
- who is entitled to purchase-money for leaseholds taken under compulsory powers, *ib.*, 649
- title to fund for renewal as between, 648
- apportionment of fines for renewals between, *ib.*, 649

**TENANT IN TAIL,**

- after possibility of issue extinct, 330, 331

**TERM,**

- devise subject to, when vested, 475, 476

**TESTAMENTARY**

- capacity, 14, 19
  - sanity, 14
  - delusions, *ib.*
  - lucid interval, 15
  - of infants, *ib.*
  - of married woman, 15—18
  - of alien, 18
  - of traitors, felons, and suicides, *ib.*
  - of outlaw, 19
- expenses, what are, 624
  - do not include costs of administering realty; *Patching v. Burnett, Law Times*, July 2, 1881.
  - effect of charge of, on realty, 641
- gift, what is a, 9, 10
- guardians, how appointed, 77—79
- power, what is a, 73, 74
  - how to be executed, 74, 75

**THEN,**

- to what period of time referred,
  - in gifts to persons entitled under the statute, 382
  - \_\_\_\_\_ "then living," 422, 423
  - stirpital construction of, *ib.*
  - gifts to persons then living or their issue, 492
  - devise in default of issue to persons "then living," effect of, 534, 535

**THINGS IN A HOUSE,**

- gift of, 121, 122, 150, 151, 186

**TIMBER,**

- when tenant for life is entitled to, 644—646

**TITLE,**

- gift of property in support of a, effect of, 553
- executory trust of property, in support of a, 558

**TITLE BY POSSESSION,**

- is devisable, 72

**"TOGETHER WITH,"**

- effect of words, in restricting large words, 183
- effect of words, in making the thing so given specific, 172

**TOMB,**

- gift to build, whether charitable, 291, 292
- gift of surplus to charity after gift to repair, 585

**TRUST,**

- parol and secret, evidence of, 64, 65
- when it may be devised, 75
- what words create a, 378, 379
- precatory words, when they create, 379—386
  - direction to be kind to, remember, provide for certain persons, 379
  - the property to be subject to the trust must be definite, *ib.*, 380
  - no trust fixed on what the donee does not dispose of, 380
  - request to employ a person as manager, *ib.*
  - the objects of the trust must be definite, *ib.*
  - precatory words explained by context, 381
  - what precatory words create a, *ib.*, 382
- what interest the donee in, takes, 382—386
  - gift upon and subject to, 382, 609
  - gift upon condition, 382
  - where the whole is given in trust, *ib.*, 383
  - words of benefit superadded, 383
  - where the trust arises on death of the donee, *ib.*, 384
  - when the donee in, is an object of the trust, 385
- motive distinguished from, *ib.*
- condition distinguished from, 382, 398
- and power to sell distinguished, 355
- legacy to benefit legatee in a particular way, 386

**TRUST ESTATES,**

- when they pass under general words, 168—170
- (See GENERAL WORDS.)

**TRUSTEES**

- of a charity, gift to, whether charitable, 296
- liability of, for not converting property, 364, 365
- indemnity to, 369
- gift of annuity to, duration of, 396
- when they take lands devised to them beneficially, 612



TRUSTEES, ESTATES OF, 346—353

- when they take the legal estate, 346—349
  - appointment of trustees of inheritance, 346
  - revocation of devise to trustee, *ib.*
  - direction to let, *ib.*
  - pay annuities, 347
  - effect of the Statute of Uses, *ib.*
  - devise on trust to pay rents, *ib.*
    - to permit a person to receive rents *ib.*
    - to permit a person to receive net rents, *ib.*
  - devise to permit a person to receive rents to separate use, *ib.*, 348
  - trust to preserve contingent remainders, 343
  - effect of a power to give receipts, *ib.*
  - trust to pay debts and legacies, *ib.*
  - trust to pay debts out of realty if personalty is insufficient, *ib.*, 349
  - leaseholds for years and copyholds not within the statute, 349
  - appointment under a power to appoint the use, *ib.*
- quantity of, 349—353
  - same rules apply to copyholds, leaseholds, and freeholds, 349
  - devise in fee, with power to sell, *ib.*
  - direction to transfer copyholds, *ib.*
  - power of sale not arising till after a life estate, 350
  - devise without words of limitation, with power of sale, *ib.*
  - devise in fee till an infant attains twenty-one, *ib.*
  - devise in fee to preserve, *ib.*
  - devise in fee on trust to pay rents for life with remainder, *ib.*, 351
  - effect of leasing power where the devise is in fee, 351
  - effect of remainders to the separate use, *ib.*
  - devise in fee with direction to pay debts, *ib.*, 352
  - mere charge of debts, 352
  - general direction to pay debts where the devise is without words of limitation, *ib.*
  - devise without words of limitation to pay debts, *ib.*
  - effect of the Wills Act on, *ib.*, 353
- when they take a power of sale (see EXECUTORS), 360—363
  - distinction between estate and power, 360

TRUSTEES TO PRESERVE,

- estate of, 350, 399
- when estates directed to shift, pass to them, 550

U.

UNCERTAINTY,

- gift to one of a class is void for, 219
- a family may be void for, 267
- for purposes of liberality and benevolence is void for, 290, 291
- for charitable or other indefinite purposes is void for, 298
- of some of my linen is void for, 584
- of a handsome gratuity is void for, *ib.*
- is not void if testator supplies a measure, *ib.*
- of a sum not exceeding a certain amount, *ib.*
- of residue when the residue cannot be ascertained, *ib.*, 585
  - the Court will if possible ascertain the residue, 585

UNDISPOSED OF INTERESTS,

- who is entitled to (see NEXT OF KIN, HEIR, RESULTING TRUST), 608—617

UNDUE INFLUENCE,

- what is, 20, 21

## UNIVERSITIES

not within the Mortmain Act, 310, 311

## UNMARRIED,

meaning of, in direct gift, 218, 219

gifts to next of kin of A. as if she had died, 279, 280

construction of gifts over upon death unmarried and without issue, 527 528

where vested interests are given at twenty-one, 527

when it may refer to a second marriage, *ib.*

where the gift is for life with remainder to children, *ib.*, 528

in what cases "and" will be changed into "or," 528—530

when unmarried will mean not married at the death, 527—529

where the prior gift is absolute, 529

## UNSETTLED LANDS,

devise of, what passes under, 162—164

## USE

of plate, 156

of book debts, 156

## USE AND OCCUPATION

of a house, devise of, 156

## V.

## VALIDITY

of will, what necessary to,

testamentary capacity, 14—19

knowledge of contents, 20

influence exercised over testator, 21

undue influence, *ib.*

fraud and mistake, *ib.*, 22

how to be executed, 23—26

how to be attested, 26—31

*VENTRE, CHILD EN* (see *CHILD EN VENTRE*), 237—239, 249, 334

*VERITAS NOMINIS TOLLIT ERROREM DEMONSTRATIONIS*,

where the maxim applies, 210

## VESTED,

meaning of, 407, 408

when it means payable in direct gifts, 408

————— in gifts to children who survive their parents,  
419, 420

## VESTING,

I. of real estate, 400—406

general leaning in favour of, 400, 401

if, when, or at, import contingency, 401

distinction between a devise when or if the devisee attains a given  
age and a proviso in a distinct sentence, 402

express direction as to, *ib.*

devise to A. till B. attains twenty-one, and then to B., *ib.*

————— A. for life, and from and after his death to B., if of age,  
*ib.*, 403

whether the words from and after are material, 403

effect of gift over upon death under twenty-one on prior contin-  
gent devise, *ib.*

devise to class who shall attain twenty-one, *ib.*, 404

VESTING—*continued.*

- where the contingency imports only the determination of prior interests, 404, 405
- limits of the doctrine, 405
- remainder to arise upon determination of prior estate by marriage is vested, *ib.*, 406
- whether the fact that the gift over is to the tenant for life and others is material, 406
- II. of interest charged upon land, *ib.*, 407
  - legacies charged on land vest when they are payable, 406
  - payment postponed for purposes of the estate, 407
  - charge payable upon an uncertain event is contingent, *ib.*
  - legacy charged upon real and personal estate follows the rules of that out of which it is paid, *ib.*
- III. of bequests of personalty, 407—423
  - rules apply to realty directed to be converted, 407
  - express direction as to vesting, 407—409
    - meaning of word "vest," 407, 408
    - effect of gift over on death before time of vesting, 408
    - when vested means payable, *ib.*
    - gift over upon death without issue before vesting, *ib.*
    - shares treated as vested before the appointed time, *ib.*
    - vested and paid used interchangeably, 409
    - direction to pay legacies at a certain time, *ib.*
    - effect of, where gift is to children who survive their parent, *ib.*
    - direction as to beneficial interest, effect of, *ib.*
  - where there is no direction as to vesting, 409—423
    - gift to contingent class and class upon a contingency, 409, 410
    - contingency not imported into gift to a single child, 410
    - gift with direction to pay at a given age, *ib.*
    - what is a clear gift, *ib.*
    - direction to accumulate interest till twenty-one, *ib.*
    - doubtful cases may be solved by reference to other limitations, *ib.*
    - to be paid may mean to be vested, 411
    - gift to be paid at a time which may never come is contingent, *ib.*
    - effect of gift of intermediate income, *ib.*
    - gift upon marriage construed as gift at twenty-one or upon marriage under twenty-one, *ib.*, 412
    - when the only gift is through the direction to pay, *ib.*
    - direction to pay after a life interest, *ib.*
    - direction to pay at twenty-one, *ib.*
    - effect of severance, *ib.*
    - effect of gift of intermediate interest, *ib.*, 413
      - of interest subject to charges, 413
      - for maintenance, *ib.*
      - of interest till twenty-one, and then the capital *ib.*
      - of interest till an advanced age and capital not till then, *ib.*
    - effect of discretion to apply all or part of interest, *ib.*, 414
    - where the gift is a residue, 414
    - effect of discretion either to apply interest or accumulate it, *ib.*
    - effect of discretion to apply interest not exceeding a fixed sum, 414
    - gift of a sum for maintenance out of the personal estate not exceeding the interest, *ib.*

**VESTING**—*continued.*

- power to trustees to exclude any legatees from interest, 414
- gift of interest for part of the period before vesting, *ib.*, 415
- where the gift of interest is itself contingent, 415
- gift of interest upon a legacy and upon a fund given to a class, *ib.*
- gift to A. till B. attains twenty-one, and then to B., *ib.*, 416
- effect of a power of advancement, 416
- fact that the gift is of residue favours, *ib.*
- effect of gift over before time of, *ib.*
- effect of a clause of accruer, *ib.*
- effect of gift over upon death without issue upon, 417
  - upon death under twenty-one, without issue, *ib.*
- gift to A. for life, then to children at twenty-one, and if A. dies without issue over, *ib.*
- gift to a class when the youngest attains twenty-one, *ib.*, 418
- whether those dying under twenty-one take anything, 418
- gifts to children who survive their parents, 418—422
- distinction as to portions between settlements and wills, 418
- gift to children living at their parents' death is contingent, *ib.*, 419
- effect of the word "such," *ib.*
- when it may be rejected, *ib.*
- gift to children surviving their parents explained by context, *ib.*, 420
- effect of a direction as to vesting, 420
- gift over in events, not including death of some of the children over twenty-one before their parents, *ib.*
- gift to a class upon a contingency, *ib.*
- when the contingency will be imported into the constitution of the class, *ib.*, 421
- gift to persons then living, 422
- gifts in default of appointment, 422, 423
  - where the persons to take under the power and in default are the same, *ib.*
- direction against, of personality in tenant in tail dying under twenty-one, 439, 440
- gifts over upon death before, 519, 520
  - take effect upon shares of legatees dying before testator, 519
  - refers to vesting in interest, *ib.*
  - where it refers to death before payment, *ib.*
  - where vesting is explained to mean payment, 520

**VOLUNTARY SOCIETY,**

- gift to, whether charitable, 291

**W.****WAGES,**

- bequest of a year's, effect of, 215

**WAIVER**

- of conditions by testator, 455, 456

**WASTE,**

- in what case tenant for life will be made unimpeachable for, 560, 561
- tenant for life impeachable for, title of to produce of land 644, 645

**WAY OF NECESSITY,**

- when it passes by devise, 156

WIFE,

- gift to the testator's 214, 216
- fraudulent assumption of character of, 215
- gift to the, of a third person, means the wife at the date of the will, 216
  - when a second wife included, 217
- husband and, construction of, *ib.*, 218
- whether included in persons entitled under the statute, 275
- not entitled as next of kin by statute, 276

WILD'S CASE, RULE IN,

- applies to devise to several and their issue and their heirs, 332
- devise to A. and his children, 333
- devise to A. and his children in succession, *ib.*, 334
- devise to A. and his children, he having none, 334
- child *en ventre* is for this purpose non-existent, *ib.*
- intention that the parent was not to take an estate tail, *ib.*
- where A. has children at the date of the devise, *ib.*
- whether the rule applies to personalty, 335

WILL,

- what may take effect as, 9—13
- what papers constitute, 31
- what the word includes, 62, 63
- condition not to dispute (see CONDITIONS), 452, 453

WILLS ACT (see APPENDIX), 653

WITNESS ATTESTING,

- to signature of testator, 26, 27
- signature by, 29, 30
- gifts to, 94

*M. W. S. 1/16/4 - 1/17/4*

Y.

YOUNGER,

- meaning of, 220—225
- when class of, children ascertained, 221, 222

THE END.



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THE Acts of the 36 Geo. 3, Cap. 52, and 45 Geo. 3, Cap. 28, and 44 Vict., Cap. 12, contain the Regulations relative to the Duties on Legacies and Residues.

*Receipts to be taken.*

1. NO Person is to pay a Legacy without taking a Receipt for the same expressing the Date of the Receipt, the Name of the Testator, the Name of the person to whom the Receipt is given, and of the Person to whom the Legacy is bequeathed, the amount or value of the Legacy, and the amount and rate of the Duty payable thereon.

2.—All Legacy Duties can be paid personally, or by an Agent, at the Legacy Duty Office, Somerset House, where also the proper forms can be obtained.

3.—Executors or their Agents residing in the Country, will be supplied with the necessary Forms on applying to the Collector of Inland Revenue, or at any Post Office issuing Money Orders. When the Forms are properly filled up they should be transmitted by post, addressed "The Controller of Legacy and Succession Duties, Somerset House, London," for examination, and when the Receipts and Accounts are found to be correct, instructions for the payment of the Duty will be given.

*How Forms can be obtained and Duties be paid.*

The Forms in use are:—

No. 1, For all Legacies; No. 2, For all Annuities; and No. 3, For Residue.

### *Succession Duty.*

No. 4.—For an account of Personal Property under Settlements where the Duty is chargeable on the capital value.

No. 5.—For an account of Personal Property under Settlements where the Duty is chargeable by way of Annuity.

No. 6.—For an account of Real Property.

No. 7.—For the second and subsequent instalments of Duty on Real Property.

*When the Duties are to be paid.*

4. The Duties on Legacies are to be paid at the time of paying, delivering, or otherwise discharging the Legacies; but if by reason of infancy, or the absence of the Legatees, or any other cause, the Legacies cannot be paid, but are *Retained* for the use of the Legatees, the payment of the Duties is not to be deferred till such Legacies are actually paid, but the Duties are to be accounted for when the Legacies are so *Retained*.

*A Legacy to an Infant.*

5. A Legacy payable to a Legatee on his attaining the Age of 21 Years, or at some future period, the Interest of which is directed by the Will to be applied for the benefit of such Legatee until the Legacy becomes payable, being a vested Legacy, the Duty is payable on the Amount or Value of such Legacy *immediately*, and the Office Form for the payment of the Duty is to be filled up and signed as a *Retainer* of the Legacy in Trust for the use of the Legatee.

*How Annuities are to be valued.*

6. The Value of any Legacy given by way of Annuity for any Life or Lives, or for Years determinable on any Life or Lives, or for Years or other period of time, must be valued by the Tables annexed to the 16 and 17 Vic., Cap. 61, and the Duty is to be paid on such Value by equal instalments out of the first four Annual Payments of the Annuity.

*A Legacy to different persons in succession.*

7. Any Legacy or Residue given to different Persons in succession, liable to the same rate of Duty, is to be charged with Duty on the amount thereof, as in the case of a Legacy to one Person. And if any Legacy or Residue be given to different Persons in succession, liable to *different* rates of Duty, they who take for Life only, or other temporary Interest, are to pay as *Annuitants*; and when any Person or Persons shall become entitled to the Principal, or when upon the death of a Tenant for Life all the remaining Persons in the Succession shall be liable to the same rate of Duty, then the Duty must be paid upon the *Principal* as if the same had come to them immediately on the Death of the Testator.

*A Legacy subject to a Contingency which may defeat the Gift.*

8. A Legacy given subject to any Contingency which may defeat the Gift, is nevertheless to be charged with Duty as an *absolute bequest*, and the Duty is to be paid out of the Capital of such Legacy; and should the Contingency afterwards happen, and the Legacy go to one liable to a higher rate of Duty, such Legatee is to pay the difference. See 36 Geo. 3. c. 52. sect. 17.

*Leasehold Estates.*

9. Leasehold Estates are chargeable with Duty as Real Property under the Succession Duty Act.

*How to account for the Residue.*

10. For the Payment of the Duty on the Residue, a statement of the Deceased's Personal Estate and the Monies arising from the Sale or Mortgage of Real Estate, *or the Value of the Real Estate if not sold*, when the same is directed by the Will or Codicil to be *sold or mortgaged*, and of all payments made thereout, is to be rendered on the Office printed Residuary Form No. 3, together with a Duplicate thereof, and the Duty when assessed on the amount or Value of the clear Residue must be paid *within Fourteen Days* after such assessment *under a Penalty of Treble the Value of the Duty*.

*Rents, Dividends, &c., to be included in the Residuary Account, up to the date of the delivery thereof.*

11. It having been determined by the Court of Exchequer, that the Duty is chargeable upon the Amount or Value of the Property as it stands *with its accumulations* at the time of the Residuary account being delivered, and *not as it stood at the time of the Death of the Deceased*, it follows, that in rendering an account of the Residue, all Investments which shall have been made of any part of the Deceased's Personal Estate, and all Dividends, Interests, and Profits arising from the Personal Estate of the Deceased, subsequent to the time of the Deceased's Death, and all accumulations thereof down to the time of the Executor's delivering the Account, and offering to pay the Duty thereon, *must be considered as part of the Deceased's Personal Estate*, and accounted for accordingly.

*When and how Effects are to be valued.*

12. Effects, not consisting of Money or Securities for Money, and not sold, are to be valued at the time the Account is rendered; when Inventories, and proper Valuations thereof will be required to be produced; the Stocks, Shares, &c., are to be valued at the medium Price of the Day on which the Account is dated.

*When the Residue is given for Life, a distinct account must be kept of the Rents, Dividends, &c.*

13. Where the Residue of Personal Estate is given to one for Life, and afterwards to others, a distinct Account must be given of the Rents, Dividends and Interest accrued subsequent to the death of the Testator, and of the Payments thereout for Interest of Legacies, and for Interest of the Testator's Debts, accrued after his decease, so that the Balance due to the Residuary Legatee for Life may be clearly ascertained, and the proper Duty charged thereon.

*No Legacy specifically bequeathed to be included in the Residue without giving Notice thereof.*

14. If any Legacy specifically bequeathed shall be included in the Account of Residue by reason of the same being given to the Residuary Legatee; or of the Person entitled to the Legacy, and the Residuary Legatee being liable to the same rate of Duty, *it will be necessary*, in order that such Legacy may be discharged in the Books of the Legacy Duty Office, and *to prevent the Executors from being afterwards called upon to account for the Duty on such Legacy*, to attach a Note to the Residuary Statement describing the Legacy and stating the same to be included in the Account.

*Insolvent Estates.*

15. In Cases of Insolvency, an Account must be rendered by the Executors in the manner before directed, in order that the Commissioners may satisfactorily ascertain that the Estate is not chargeable with Duty.



## RATES OF DUTIES payable on Legacies, Annuities, and Residues.\*

\* If the deceased died on or after the 1st June, 1881, every pecuniary Legacy or Residue, or share of Residue, although not of the amount or value of £20, is chargeable with Duty by the 44 Vict., Cap. 12, Sec. 42.

<i>In filling up the Legacy Receipts and the Declaration in the Residuary Account, the Consanguinity or Description of the Legatee or Annuitant must be in the following Words of the Act.</i>	Out of <i>Real</i> or Personal Estate.
To Children of the Deceased, or their Descendants, or to the Father or Mother or other Lineal Ancestor of the Deceased	£1 0 0 per Cent.
To Brothers and Sisters of the Deceased, or their Descendants	£3 0 0 per Cent.
To Brothers and Sisters of the Father or Mother of the Deceased, or their Descendants .....	£5 0 0 per Cent.
To Brothers and Sisters of the Grandfather or Grandmother of the Deceased, or their Descendants .....	£6 0 0 per Cent.
To any Person in any other Degree of collateral Consanguinity, or to a Stranger in Blood to the Deceased.....	£10 0 0 per Cent.

The Persons chargeable with Duty, at the rate of £1 per Cent., are exempt in cases where the Probate or Letters of Administration have been obtained on or after the 1st June, 1881, in respect of the Estate and Effects, according to the value, whereof Duty shall have been paid on the Affidavit, or Inventory, or Account, in conformity with the 44 Vict., Cap. 12.

The Husband or Wife of the Testator is not chargeable with Duty; and a Legatee whose Husband or Wife is of nearer relationship to the Testator, is chargeable with Duty at the lower rate.

Appraisements or Valuations of any Property made for the purpose of ascertaining the Legacy Duty payable in respect thereof, are exempt from Stamp Duty.

NOTE.—It is absolutely necessary, that the time when the Testator died, and when, and in what Court the Will was proved, should be inserted in each Receipt and Residuary Account.

### PENALTIES.

*Persons paying or receiving any Legacy, Residue or Share of Residue liable to Duty, without taking or signing the proper Receipt for the same, will be subject to a Penalty of £10 per Cent. on the Amount or Value of such Legacy, Residue, or Share of Residue.*

*Every Legacy Receipt must be dated on the Day of Signing, and the Duty thereon paid within Twenty-one days from the date thereof, under a Penalty of £10 per Cent. on the Amount of the Duty: and if the Duty shall not be paid within Three Months from the date of the receipt, a Penalty will then be incurred of £10 per Cent. on the Amount or Value of the Legacy.*

*The Commissioners of Inland Revenue cannot under any circumstances stamp a Receipt on which the Duty shall not be paid within Twenty-one Days from the date, unless the Penalty incurred be also paid.*

WILLS, May 6



16



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## SUCCESSION DUTY.

By the Act 16 and 17 Victoriae, cap. 51, called  
"The Succession Duty Act, 1853," duties are  
made payable upon all Successions to Property  
upon Death; and it is by this Act declared that:—

**"Real Property."** The term "Real Property," shall include all Freehold, Copyhold, Customary, Leasehold, and other Hereditaments, and Heritable Property, whether Corporeal or Incorporeal, in Great Britain and Ireland, except money secured on Heritable Property in Scotland, and all Estates in any such Hereditaments.

**"Personal Property."** The term "Personal Property," shall not include Leaseholds, but shall include Money payable under any engagement, and Money secured on Heritable Property in Scotland, and all other Property not comprised in the preceding definition of Real Property.

**"Property."** The term "Property" alone, shall include Real Property and Personal Property.

**"Succession."** The term "Succession," shall denote any Property chargeable with Duty under this Act.

**"Trustee."** The term "Trustee," shall include an Executor and Administrator, and any Person saving or taking on himself the Administration of Property affected by any express or implied Trust.

**What Dispositions and Devolutions of Property confer Successions.** Every past or future disposition of Property, by reason whereof any Person has or shall become beneficially entitled to any Property, or the Income thereof, upon the death of any Person dying on and after the 19th day of May, 1853, either immediately or after any interval, either certainly or contingently and either originally or by way of substitutive limitation; and every devolution by Law of any beneficial Interest in Property, or the Income thereof, upon the death of any Person dying on and after the 19th day of May, 1853, to any other Person, in possession or expectancy, shall be deemed to have conferred or to confer on the Person entitled by reason of any such Disposition, or Devolution, a "Succession;" and the term "Successor," shall denote the Person so entitled; and the term "Predecessor," shall denote the Settlor, Disposer, Testator, Obligor, Ancestor, or other Person from whom the interest of the Successor is or shall be derived.

**Joint Tenants.** Joint Tenants, taking by Survivorship are deemed Successors.

**Powers.** Powers of Appointment, when executed, confer Successions.

**Dower and other Charges.** Extinction of Determinable Charges confers Successions, such as Dower, Widow's Jointure, Rent Charges, Annuities, and other Charges, whether of Income or Principal.

**Reservation of any Benefit.** Dispositions, accompanied by the Reservation of a Benefit to the Maker, confer Successions.

**Secret Trusts or other Evasions.** Dispositions to take effect at Periods, dependent on Death, or made with an Engagement, Secret Trust, or Arrangement, or made for Evading Duty, confer Successions.

*Alienation or Sale of Reversions.* If Reversionary Property, expectant upon Death, be vested by Alienation or other derivative title in any Person other than the Person originally entitled under the before-mentioned Dispositions or Devolutions, the Duty shall be payable at the same Rate and Time as if no such Alienation had been made or derivative title created.

*When Duty Payable.* The Duties to be payable when the Successor becomes entitled in possession to his Succession, or to the receipt of the Income or Profits thereof.

*Successor to Real Property to pay on Life Value.* The interest of a Successor in Real Property, not subject to a Trust for Sale shall be considered as an Annuity, equal to the Annual Value for his Life or for any lesser period during which he shall be entitled thereto, and the value of such annuity shall be calculated by the Tables annexed to the Succession Duty Act, and the Duty chargeable thereon shall be paid by eight equal Half-yearly Instalments, the first to be paid Twelve Months next after the Successor shall become entitled to the beneficial enjoyment, and the Seven following Instalments at Half-yearly intervals of Six Months each, from the day when the First Instalment becomes due. If the Successor die before all such Instalments be due, the remaining Payments to cease, except the Successor has the Real Property absolutely, and then all the Instalments to be paid.

*All Necessary Out-goings to be deducted.* In estimating the Annual Value of Lands used for Agricultural Purposes, Houses, Buildings, Tithes, Toids, Rent-charges, and other Property yielding or capable of yielding Income not of a fluctuating character, an allowance shall be made of all Necessary Out-goings.

*Timber.* The Duty for Timber (not being Coppice or Underwood, yielding Profit Yearly), shall be paid upon Sales exceeding £10 yearly. The whole Duty may be commuted.

*Advowsons.* The Duty on Advowsons, when sold, payable on the purchase money.

*Fines on Renewal of Leases, &c.* Where Property subject to Lease, and a further Lease be made, Duty payable on Fine, &c.

*Manors, Mines, and other Fluctuating Income.* The Yearly Value of any Manor, Opened Mine, or other real Property of a fluctuating Yearly Income, to be calculated upon an average of Past Profits or Income as shall be agreed upon; but where the circumstances do not admit of such agreement recourse is to be had to a percentage upon the Saleable Value.

*Successor to Personal Property to pay as a Legacy.* The Successor to Personal Property to pay Duty as if such Personal Property were a Legacy bequeathed by the Predecessor to the Successor.

*Real Property, if sold.* Money from the Sale of Real Property, under any Trust for Sale, is chargeable with Duty as Personal Property.

*Money to Purchase Real Property.* Money subject to Trust for Purchase of Real Property to be entailed, is chargeable with Duty as Real Property.

*Allowance for Incumbrances.* No allowance to be made for any Incumbrance created or incurred by the Successor, but allowance for all previous Incumbrances. In Real Property, the Annual Interest to be deducted.

*Duty a Charge on the Property, and Trustees, &c., liable to pay.* The Duty is the First Charge on the Interest of the Successor in the Property; and the Successor and Trustee, &c., are accountable for the Duty.

*Trustees, &c., to make Returns and Accounts of Property.*

The accountable Persons are to give Notice of Succession to the Commissioners of Inland Revenue or their Officers, at the time of the First Payment, Delivery, Retainer, Satisfaction, or other Discharge of Personal Property, or any part thereof to or for the Successor or any Person in his right; and in the case of Real Property when Duty shall first become payable; and deliver a full and true account of the Property for the Duty whereon they shall respectively be accountable, and of the Value thereof, and of the Deductions Claimed, together with the Names of the Successor and Predecessor and their Relation to each other, and all such other particulars as shall be necessary or proper to ascertain the Duties fully and correctly.

*Penalty.*

The Penalty for not giving Notice or Delivering an Account, is £10 per Cent. upon Duty calculated at One Pound per Cent. for every Month of delay.

N.B.—The Forms in use are:—

**No. 4.**—For an account of Personal Property under Settlements where the Duty is chargeable on the Capital value.

**No. 5.**—For an account of Personal Property under Settlements where the Duty is chargeable by way of Annuity.

**No. 6.**—For an account of Real Property.

**No. 7.**—For the second and subsequent instalments of Duty on Real Property.

*How Forms can be obtained and the Duties paid.*

These Forms can be obtained on personal application at the Legacy and Succession Duty Office, Somerset House, London, where also the Duty can be paid. If the Parties reside in the Country the Forms can be obtained from the Collector of Inland Revenue, or at any Post Office issuing Money Orders, and when properly filled up they should be transmitted by Post, addressed "The Controller of Legacy and Succession Duties, Somerset House, London," for examination, and when the accounts are found to be correct instructions for the payment of the Duty will be given.

## RATES OF DUTY.

Lineal Issue or Lineal Ancestor of the Predecessor .....	£1 per Cent.
Brothers and Sisters of the Predecessor and their Descendants....	£3 do.
Brothers and Sisters of the Father or Mother of the Predecessor and their Descendants.....	£5 do.
Brothers and Sisters of a Grandfather or Grandmother of the Predecessor and their Descendants .....	£6 do.
Any other Person .....	£10 do.

The Husband or Wife of the Predecessor is not chargeable with Duty; and a Successor, whose Husband or Wife is of nearer relationship to the Predecessor, is chargeable with Duty at the lower rate.

Interest at the rate of £1 per Cent. per Annum, must be added on all Duties in arrear. 31 and 32 Victoria, cap. 124, Sect. 9.

*May 82*  
SUCCESSION.



Interest on legacies.

Legacies are generally payable at the end of a y<sup>r</sup> from Testors death & if not then p<sup>d</sup> will carry int<sup>y</sup> at 4 p<sup>ct</sup> cent. from the end of the year unless any o<sup>r</sup> time of payment or rate of interest is directed by the will.

If the will directs payment before the end of the y<sup>r</sup> int<sup>y</sup> will run from that time & ~~unless~~ but if directed to be p<sup>d</sup> as soon as possible int<sup>y</sup> will abegin with ~~and~~ but where the Legatee is an infant child of Testor, or to whom he had put himself in loco Parentis int<sup>y</sup> will run from the death, but an adult child is not within the exception.

If the legacy is specific the Legatee is entitled to the produce of the fund from Testors death, but to nothing more or less.

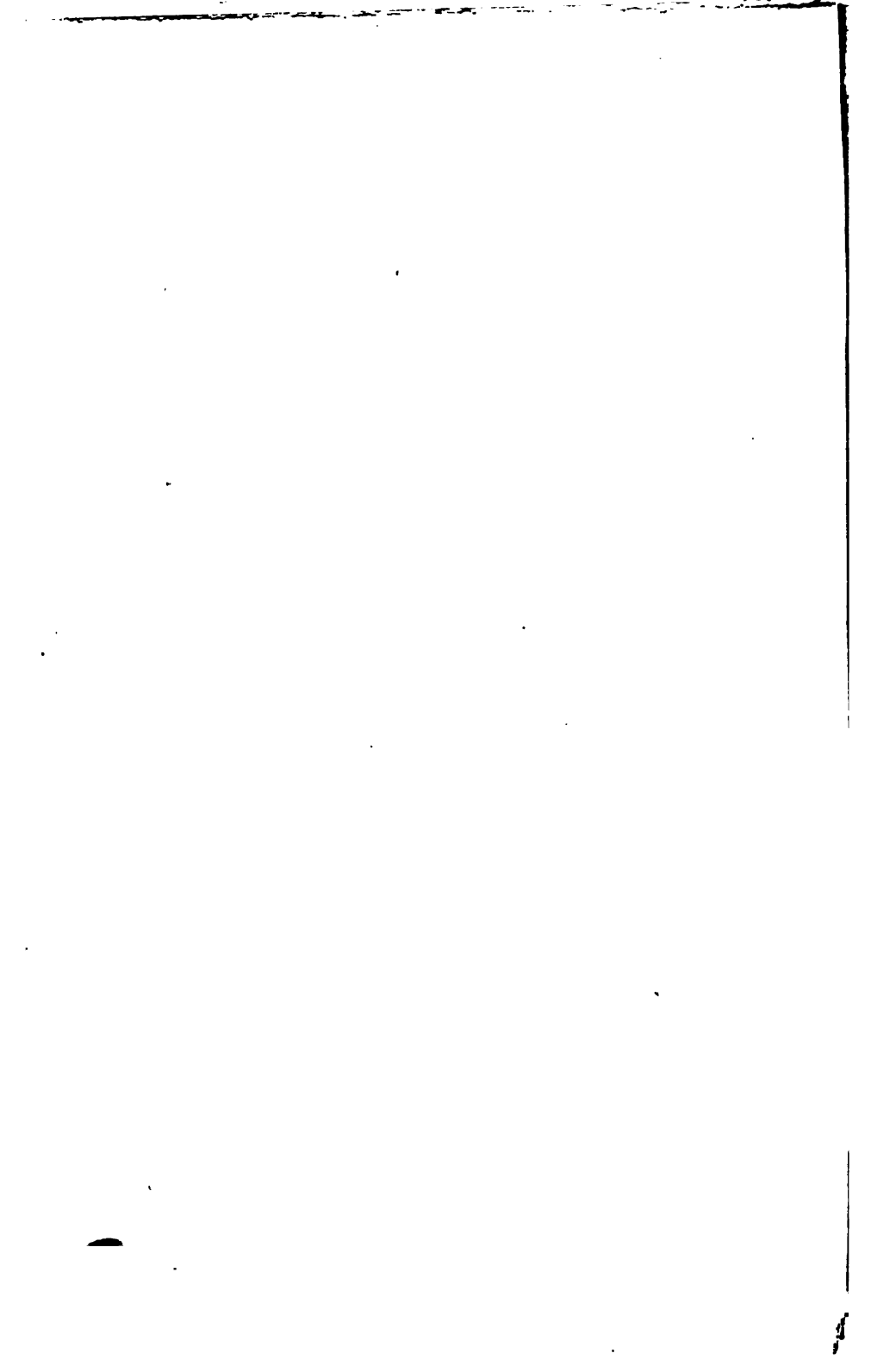
A legacy carries int<sup>y</sup> from the time for payment & not before, so that int<sup>y</sup> does not run on contingent legacies, as the contingency postpones the payment.

The life tenant of the residue takes the whole income of the prop. dur<sup>g</sup> the y<sup>r</sup> at the Testors death.

Where a sum of money is payable out of land, which is not subjected to Testors debts carries int<sup>y</sup> from the Testors death.

And where a legacy is given in satisfaction of a debt int<sup>y</sup> is payable from the death.

And if a legacy is directed to be p<sup>d</sup> at a future time, as to A on Annis 1<sup>st</sup> or to B on marrying & A annis 1<sup>st</sup> or B marries in Testors lifetime the legacy is payable at the death & interest runs from that period.



Int<sup>t</sup> is to be computed from the time when the principal is actually due & payable.

Int<sup>t</sup> will run unless payment of the legacy was impracticable & unless the assets have been unproductive.

If a legacy is given for life with reversion no int<sup>t</sup> is due till the end of 2 years. It is only int<sup>t</sup> of the legacy. & till the legacy is payable (i.e. not from the death) there is no fund to produce int<sup>t</sup>.

But it is not so as regards the residue for life with reversion. There the term for life values the int<sup>t</sup> from the death.

1<sup>st</sup> or as regards an annuity where no time of payment is mentioned it is then considered as commencing from the Testator's death & the 1<sup>st</sup> payment to be due at the end of one year.

